



TRIANGLE RESEARCH LIBRARIES NETWORK

ANNUAL REPORT: 2008-2009

This year TRLN continued to improve on several components of the Digital TRLN initiative to lead in the creation of innovative digital collections and services. A TRLN Single Copy Archive was created to reduce unwanted duplication of print materials and to allow expensive on-campus library space to be repurposed. Search TRLN entered its second year of operation with new features and enhanced functionality. A second *TRLN Management Academy: the Business of Libraries* was held in November 2008. The economic downturn affected the budgets of each of the member libraries, especially in the areas of collections, staff development, and travel. We acted cooperatively in these affected areas to lessen the impact on TRLN libraries. We also continued to maintain our core programs and services – cooperative collection development, joint licensing, document delivery, reciprocal services, and coordinated staff development and training.

SINGLE COPY ARCHIVE

Upon the completion of a successful pilot project and the formulation of a Memorandum of Understanding (MOU) signed by the university presidents or provosts of each TRLN institution, the TRLN Single Copy Archive began its first year of operation. Designating copies for the Archive allows other libraries to reduce unwanted duplication of low-use print materials. In the first year, 1,600 titles representing over 50,000 volumes were contributed to the Archive, which provided the opportunity for TRLN libraries to reclaim an estimated 11,000 linear feet of valuable on-campus shelf space. This space can be repurposed to expand services, such as instruction or to provide better on-site access to high-use collections. This is especially valuable in current times when libraries are looking for ways to reduce operating costs and to deliver more services within existing library space.

Libraries that contribute materials to the Single Copy Archive retain ownership and agree to keep them in perpetuity – subject to the MOU. The libraries catalog the volumes to reflect their archival status, and make them available for access to TRLN partner libraries through the privileged document delivery service. The Single Copy Operations Committee coordinates this program under the direction of the TRLN Collections Council. TRLN maintains lists of materials contributed to the Archive.

The Single Copy Archive is a success in large part because it capitalizes on long-standing cooperative agreements among the TRLN members. Since the 1930s, TRLN members have worked together to develop collections in a complementary and strategic fashion and to forge agreements for sharing access to those collections.

Regional organizations such as the Association of Southeastern Research Libraries (ASERL), and national organizations such as the Center for Research Libraries (CRL), are just beginning to explore ways that local archives like ours can be linked together in a broader network. The work that we have put into establishing the TRLN Single Copy Archive positions TRLN to join these larger efforts.

SEARCH TRLN

We completed the first year of operating Search TRLN, which uses the “faceted searching” and browsing capabilities of Endeca, and builds on the strengths of TRLN’s existing cooperative collecting and interlibrary delivery services. Search TRLN provides faculty and students on each campus the capability to search for and request materials from across the TRLN shared collection in a single interface.

The TRLN Endeca Operations Committee coordinates system management and software development on Search TRLN with guidance from the TRLN Collections, Services, and Technology Councils. Each campus has a local Endeca interface, which allows users to begin a search in their local catalogs and quickly expand their search via Search TRLN to discover relevant materials available at the other TRLN libraries as illustrated in the NCSU catalog below.

The screenshot displays the NCSU Libraries Search TRLN interface. At the top, there is a navigation bar with links for 'Search the Collection', 'Browse Subjects', 'Services', 'Library Information', 'Community', and 'News & Events'. Below this is a 'MY LIBRARY' section with links for 'My Account', 'Course Reserves', 'Alerts', 'Library Tools', and 'RefWorks'. The main search area includes a search box with 'donald knuth' entered, a dropdown menu set to 'Anywhere', and a 'Search' button. To the right of the search box is a blue box labeled 'Expand Your Search' which contains the text '7 results at Triangle research libraries' and 'NCSU plus Duke, NCCU & UNC'. Below the search box, there are sections for 'Your Current Search' (showing 'Anywhere' and 'Subject: Algorithms'), 'Refine Your Search' (with checkboxes for 'Currently available' and 'Available online'), and 'Results 1 - 5 of 5'. The results list includes 'Selected papers on analysis of algorithms' and 'Axioms and hulls', both by Donald Ervin Knuth. The first result is available at the D.H. Hill Library in the Stacks (6th floor). The second result is available online at NCSU only.

Request functionality is built into Search TRLN and allows users streamlined access to library materials throughout the consortium. We were particularly interested to determine if access through Search TRLN to consortial materials would increase document delivery and inter-institutional borrowing among TRLN users. We found that the integration of discovery with the request environment resulted in a nearly 70% increase in borrowing among TRLN libraries. Indeed, 40% of the books borrowed by TRLN libraries in the 2008-2009 academic year were lent by another TRLN library. A task group has been formed to gather detailed data on direct borrowing and interlibrary lending within the consortium. The Services Council will use these data to improve borrower services in the coming year.

Two major enhancement projects were completed this year. "Shopping Cart" functionality was added to Search TRLN to provide users with the ability to select specific items in a result set and to print, email, text or export those citations. Another enhancement allows users to discover archival finding aids alongside published content in Search TRLN, and to search across the full complement of archival finding aids in the TRLN libraries. This feature is made possible by indexing the metadata from archival finding aids formatted using the Encoded Archival Description (EAD) standard.

The Search TRLN project continues to attract the attention of the library profession. An article about the project was published in College and Research Libraries News in April 2009, entitled "Embracing Ambiguity...or not: What the Triangle Research Libraries Network Learned About Collaboration." Local presentations on Search TRLN were given at the Librarians Association of UNC Chapel Hill (LAUNC-CH), and the Annual Meeting of the Society of North Carolina Archivists. A national presentation was given at the Library and Technology Association National Forum.

TRLN MANAGEMENT ACADEMY

A second *TRLN Management Academy: the Business of Libraries* was held November 12-14, 2008 at the Rizzo Conference Center in Chapel Hill. While numerous leadership programs exist for developing senior library administrators, professional development opportunities for mid-level academic library managers are limited. The TRLN Management Academy was designed to fill this gap and to support talent management efforts. We expanded the class size to thirty-six in 2008.

"The Academy did an excellent job of focusing on topics relevant to managers. What was especially helpful was hearing these techniques from voices outside the library."

Applicants submitted statements of interest and letters of support from their library directors, and a selection committee chose the Academy cohort, paying close attention to applicants with some management responsibility and to those statements of interest that best matched the program. The participant group included representation from 15 states and 21 institutions, including two historically black universities. In keeping with the design of the program to meet the

management training needs of its members, half of the participants were from TRLN libraries. Noting prior satisfaction with the Academy, seven institutions (outside of TRLN) supported applicants in the second year.

The Academy was again facilitated by DeEtta Jones-Young, Principal, DeEtta Jones-Young & Associates, LLC, and included faculty from the Department of Management, Innovation, and Entrepreneurship, College of Management (North Carolina State University), the Learning and Organizational Development Program (Duke University), and the Vice Provost for Diversity and African American Affairs (North Carolina State University). Library administrators and practitioners from the TRLN libraries served as panelists to provide a current context for management roles.

Participants' comments included the following:

- "I think the Academy was just about perfect."
- "By Thursday afternoon I had a clear picture of what's expected of a good manager, and I leave here much more comfortable assuming that role and responsibilities."
- "I learned many things that are specifically valuable to my managerial context. I'm so glad I attended this!"
- "All of the information was very relevant. I really appreciated the fact that you covered topics from a number of different perspectives – the business view, the financial view, the directors' views, human resources, etc."



In March, a poster session on the Academy was presented at the Association of College and Research Libraries national conference in Seattle Washington "Growing Our Own: The TRLN Management Academy."

We made plans to offer the Academy again in November 2009 at the Rizzo Conference Center in Chapel Hill. The faculty and DeEtta Jones-Young were eager to participate again in this program. Unfortunately, it appears that travel restrictions have seriously impacted our applicant pool and we did not receive enough applications to be able to sponsor the Academy this fall. It was with great disappointment and regret that we had to cancel the 2009 Academy. We remain cautiously optimistic that we will be able to offer the TRLN Management Academy in 2010 and that we will receive a larger number of applications.

COLLECTIONS ACTIVITIES

The economic downturn has had a significant impact on the libraries' collections budgets for this year and going forward. The TRLN members have a long history of collaborative collection development, and we draw upon this strength as we look for ways to cooperate and weather these impacts together.

In February, the Collections Council organized a seminar: *“Managing Collections Budgets in Times of Economic Hardship.”* With collections budgets strained, TRLN librarians discussed methods of balancing quality collections with reduced finances. Topics included content overlap and multiple formats, negotiation and vendor communications, and collection metrics. Outreach techniques were also examined with discussions of internal communication with library staff, and external communication with students, faculty, and university administration. Following the presentations, the participants gathered in small groups and identified potential opportunities for future collaboration. These suggestions included collective action; sharing usage statistics and collections metrics; re-examining our TRLN collecting agreements; viewing the TRLN libraries’ collections as a shared collection and streamlining access for users; and working together with vendors as we renegotiate and renew our online resources. The Collections Council and the Electronic Resources Committee (ERC) have acted on many of the suggested opportunities.

One suggestion from the seminar was to consider increasing the amount of collecting that we do cooperatively. The Collections Council formed a task group to recommend a cooperative collection agreement for the Middle East, and a second task group to reexamine our agreements for Southern Americana. Another suggestion was to emphasize the view of our collections as a shared TRLN-wide collection, and to stress to faculty and students the ability to gain access to materials from any TRLN location quickly. The Services Council is beginning to look for ways to improve and enhance services for the shared TRLN collection.

On the national and international levels, TRLN endorsed two statements to publishers and information providers regarding the current fiscal climate: the International Coalition of Library Consortia (ICOLC) *Statement on the Global Economic Crisis and Its Impact on Consortial Licenses*, and the Association of Research Libraries (ARL) *Statement on the Global Economic Crisis and Its Effect on Publishing and Library Subscriptions*. TRLN also joined the Sponsoring Consortium for Open Access Publishing in Particle Physics (SCOAP³) in their efforts to convert high-energy physics literature to Open Access.

Nearly all of our libraries faced cuts to collection budgets and responded by cancelling journal subscriptions using a data-driven approach. Usage statistics were collected and analyzed along with impact factors and a calculation of cost per use. While these data were being collected to inform cancellations, they were also being gathered by the ERC in preparation for the renewal of four major electronic resources at the end of the calendar year. The usage data that the ERC gathered was made available on the TRLN web site for use by all TRLN bibliographers and collections managers. We also created a template to submit information on journals being considered for cancellation, and these submissions were combined into one database viewable on the TRLN web site with duplicate titles highlighted. The Collections Council plans to share best practices on the collection and analysis of the various metrics and to work towards gathering these data collectively in the future.

We continued to publish an electronic newsletter with information on collections activities to heighten staff awareness. The ERC continues to amass data in preparation for our upcoming

renewals. The Collections Council and the ERC published a *TRLN Open Letter to Licensed Content Providers* to describe the impact of the economy on our collections budgets, and to ask vendors to work with us to develop creative solutions to preserve access to the greatest amount of content possible to meet the information needs of our clientele.

SEMINARS AND SYMPOSIA

In March 2008, the Services Council sponsored the symposium "*Listening and Responding: Engaging Undergraduates through Action and Assessment.*" Panelists from the TRLN libraries made presentations on services assessment strategies, including collaborating with faculty and other campus service units, and prioritizing services in tough economic circumstances. Susan Gibbons, Vice Provost and Dean, River Campus Libraries, University of Rochester, gave the keynote address entitled "*Reconsidering Library Services Using Undergraduate Assessment Techniques.*" In 2007, researchers at the University of Rochester published "*Studying Students: The Undergraduate Research Project at the University of Rochester.*" Susan Gibbons, co-editor of this groundbreaking anthropological and ethnographic study of student research and writing behavior, talked about outcomes in her library in the wake of these findings. Specifically, Gibbons addressed changes made in hours, library instruction, fines, writing tutor cross-training, and delivery.

The Collections Council has also organized a series of seminars on topics related to copyright and scholarly communication, drawing on the expertise of resident scholarly communication officers. Peggy E. Hoon, Special Assistant to the Provost for Copyright Administration, NCSU, spoke at the initial seminar in August about the ARL initiative she had developed: "*Know Your Copy Rights: Five Steps to Analyzing any Copyright Question.*" Kevin L. Smith, Scholarly Communications Officer, Duke, gave a presentation "*Copyright Ownership and Rights Management: NIH, Harvard and Implications for TRLN.*" In November, a follow-up seminar was held entitled "*Five Steps to Analyzing Any Copyright Question.*" Kevin and Peggy engaged the audience in analyzing and discussing real questions they have fielded from constituents on copyright and fair use in publishing, teaching, and student activities. Another similar seminar is being planned on the copyright issues relating to special collections and digital materials.

TRLN PROGRAMS

The 2008 TRLN Annual Meeting was held in July at the Friday Center in Chapel Hill. David Whitehair of OCLC served as the keynote speaker and Jill McCorkle was the featured author. Over 300 library staff from the TRLN Libraries attended the meeting.

The Human Resources Council held a Staff Enrichment session featuring speakers on coping with job changes and innovative educational events. 95 staff members attended this session.

TRLN held four New Employee Orientation sessions at the Biotechnology Center. Ninety five new library employees at the TRLN Libraries attended these sessions.

TRLN hosted a reception for participants in member libraries' fellowship and internship programs in December.

Coordinating activities relating to digital library initiatives is one of the Technology Council's areas of responsibilities. This year the Council sponsored two seminars that focused on the challenges in building sustainable digital library collections and infrastructure. The "*Metadata Tools for Digital Collections Seminar*" was held in December 2009. Speakers from each TRLN institution gave an overview of local digital collections and technical infrastructure; described the metadata management tools and workflows they used; and reported on their challenges with those tools. The seminar gave participants a chance to learn what tools are being used in other libraries; discuss problems encountered; and identify potential areas for collaboration in the future. The "*Digital Preservation Seminar*" was held in June. The seminar began with presentations from each library regarding local digital preservation efforts and concerns. The remainder of the session was devoted to discussion. Specific digital preservation topics addressed during the seminar included policies, documentation, and communication; technologies and storage; and planning, workflows, and overall strategy.

All of the TRLN libraries are experiencing severe travel restrictions and reduced opportunities for staff development. TRLN will increase the number of sponsored seminars and symposia in the coming year to offer local presentation and enrichment opportunities for our members.

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