



TRIANGLE RESEARCH LIBRARIES NETWORK

### Annual Report: 2007-2008

This year TRLN accomplished several of the components of the Digital TRLN initiative to lead in the creation of innovative digital collections and services. Search TRLN was launched in March and provides seamless access to the more than 14 million volume combined collection with next-generation search capabilities. The inaugural *TRLN Management Academy: the Business of Libraries* was held in October 2007 and will be repeated in November 2008. A pilot Single Copy Program was completed and procedures are now in place to create a TRLN Single Copy Archive to reduce unwanted duplication of print materials. While these exciting new programs were being developed and implemented we continued to maintain our core programs and services – cooperative collection development, joint licensing, document delivery, reciprocal services, and coordinated staff development and training.

#### SEARCH TRLN

Using the “faceted searching” and browsing capabilities of Endeca, and building on the strengths of TRLN’s existing cooperative collecting and interlibrary delivery services, Search TRLN provides a single search and request environment for faculty and students on each campus. With TRLN having pioneered the nation’s first consortia online catalog as early as the 1980s, Search TRLN adds next-generation search capabilities to the consortium’s combined collection. Endeca’s approach to information retrieval mimics the human discovery process by integrating the two most common means of finding information online – searching and browsing – allowing people to adapt and refine their search based on their own determinations of relevancy. Users can browse their results along facets such as subject, format, location, and availability, and can sort them by publication date, title, author, call number, and popularity.

Search TRLN further enriches the search experience by incorporating not only traditional bibliographic records but also additional descriptive information provided by Bowker’s Syndetic Solutions, including cover images, summaries, track listings, audiovisual reviews, and first chapters/excerpts, whenever available. The TRLN libraries have also licensed searchable table of contents data from Syndetic Solutions ICE service for books published since 1984. Users of the system can now search the collections by chapter title and chapter author.

One-stop access to the entire body of TRLN’s collections is especially useful to the faculty and students at the four universities because there is relatively little duplication among their collections. TRLN is one of the oldest consortia in the country, and has been highly successful in the area of cooperative collection development. A recent analysis of collection overlap

demonstrated that 71 percent of the titles were unique to a single TRLN institution, and only 2% of our collections are duplicated on all four campuses. Items from the shared collections are made available to eligible users – TRLN students, faculty and staff – through reciprocal borrowing arrangements and electronic/hard-copy document delivery. Request functionality has been integrated into Search TRLN.

In implementing Endeca, TRLN built on the experience of the NCSU Libraries, which in January 2006 was the first academic library in the world to deploy the popular e-commerce software. The phase one goals for the TRLN Endeca implementation included indexing over ten million titles, building a user interface, providing near real-time availability status, and providing an integrated request service. A Steering Committee had oversight for the project while library staff from all four campuses worked with the TRLN Implementation Librarian on task groups to carry out the project. Over 70 staff members from all four TRLN institutions made direct contributions to the success of Search TRLN.

TRLN contracted with MCNC, a non-profit organization in Research Triangle Park, to host the TRLN Endeca servers in their data center. MCNC staff members provide hardware, system support, and uptime monitoring services. Through these arrangements TRLN provides shared hardware and software services to the library systems staffs at each TRLN library for the first time since the early 1990s.

An Endeca Operations Committee has been formed to coordinate TRLN Endeca system operations and to communicate and consult with library staff regarding system development. Phase 2 goals for Search TRLN are likely to include the incorporation of non-MARC data and improvements to the user experience. Ongoing evaluation of Search TRLN usage will be conducted to determine its impact on library services. One area of particular interest is the degree to which streamlined access to consortial materials increases document delivery and inter-institutional borrowing among TRLN users. The TRLN Technology, Services, and Collections Councils will provide vision and guidance to support ongoing innovation and library collaboration based on this shared technology framework.

A new brochure was produced to highlight the services and functionality of Search TRLN, including the enriched content of tables of contents and book cover images. In partnership with Duke University Press and the University of North Carolina Press, the brochure features cover art from selected titles by local faculty. A bookmark was also created to advertise the document delivery service available to TRLN members, and circulates with every book loaned within TRLN.

**SEARCH TRLN**

Search TRLN: A single interface discovery tool that searches across the collections of all four TRLN institutions.

**Faceted searching and browsing:** Using the Endeca software, with Search TRLN users can browse results along facets such as subject, format, location, and availability and can sort them by publication date, title, author, call number, and popularity.

**Enhanced content:** Search TRLN displays book cover art and summaries, and indexes tables of contents for books for more than 20 years of material—making books and book chapters more discoverable and easier to access than ever.

**Single search and request environment:** TRLN libraries offer priority loans within two business days of a request and request functionality is built into Search TRLN. Researchers across TRLN have access to the collections at all of the member libraries. Items may be borrowed from any of the campuses with a valid faculty or student ID card.

[HTTP://SEARCH.TRLN.ORG](http://search.trln.org)

**SELECTIVE SUBJECT STRENGTHS**

**Duke University:** Advancing history, American newspapers (mid 19th- and 20th centuries), church history & Methodism, history of economic thought, history of medicine and science, international studies and international law, labor history, Southern Americans, and women's studies.

**North Carolina Central University:** African American studies and practitioner-oriented materials in U.S. federal law.

**North Carolina State University:** Computer science, engineering, agriculture, veterinary medicine, textiles, design, architecture, and geologic information.

**University of North Carolina at Chapel Hill:** Business and economics, classics, dramatic art, Italian, French, German, journalism, music, population studies, public health, sociology, Southern and Afro-American.

**RENEWED RESEARCH COLLECTIONS**

Together, TRLN library collections comprise one of the premier research collections in the United States. Through cooperative collection development over decades, member libraries maintain the number of unique holdings in the region, with 70% of the books held in TRLN libraries unique to a single member institution.

The collections of the TRLN libraries form one of the largest academic research collections in the nation with more than 14 million volumes, access to more than 125,000 journal subscriptions, materials in dozens of languages and unique special collections at each library.

The Search TRLN project has caught the attention of the library profession. TRLN and Syndetic Solutions issued press releases announcing the service. Local presentations on Search TRLN were given at the TRLN Annual Meeting, the North Carolina Independent Colleges and Universities (NCICU) Acquisitions Meeting, and at each of our member libraries. Search TRLN was featured at a half-day program on next generation discovery systems at the annual meeting of the International Coalition of Library Consortia (ICOLC) in San Francisco. TRLN once again hosted meetings of the Endeca Library Users Group at midwinter and annual meetings of the American Library Association.

## TRLN MANAGEMENT ACADEMY

The inaugural *TRLN Management Academy: the Business of Libraries* was held October 22-26, 2007 at The Friday Center in Chapel Hill. The Academy was designed to support talent management efforts by addressing gaps in preparation of librarians for management roles in the current environment. The Academy was advertised via electronic lists to library directors and personnel officers; interest was high and the selection process competitive. We received 52 applications for the program and accepted 33 participants. The participant group included representation from nine states within the U.S. as well as Canada and the Virgin Islands, two historically black universities and an array of library experiences and professional interests. In keeping with the intent of the program, half of the participants were from TRLN libraries. In making final selections, the TRLN Academy Advisory Board paid close attention to applicants with some management responsibility and to those statements of interest that best matched the program's design. When the participants were selected, TRLN issued a press release listing their names and institutions.

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*"It did a great job addressing the specific needs of middle managers. The challenge now is to retain my enthusiasm in the midst of day-to-day work. I really think that these tools will help a lot."*

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The Academy was 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), the Vice Provost for Diversity and African American Affairs (North Carolina State University). James G. Neal, Vice President for Information Services, Columbia University was a special guest presenter for the event. Library administrators/practitioners served as panelists to provide a current context for application of the program of study.

We gathered feedback from the faculty, the participants and their library directors and all of it was overwhelmingly positive.

Participants' comments included the following:

- "Great experience and incredible learning and development opportunity."
- "The Academy addressed many of the issues that I deal with on a daily basis. The communication skills were invaluable."
- "The best management training I've ever had."
- "All of the topics covered were spot-on for managers. I will use a lot of these ideas and tools at my own library."
- "I have a sense of confidence in my ability/future as a manager now."
- "It was so effective particularly because of the emphasis on interaction. I think it was divided in such a way that the concepts did not run together. We were also given ample time to discuss content with other participants."

In April an online poster session on the Academy was presented at the ACRL-LAMA Joint Spring Virtual Institute "Learning from the Middle: Managing in all Directions."

The Academy will be offered again this year November 10-14, 2008, at the Rizzo Conference Center in Chapel Hill. The faculty have agreed to participate this year, having thoroughly enjoyed the inaugural event, and DeEtta Jones-Young will again coordinate the program and facilitate the Academy. We can accommodate 36 participants this year and expect half of that group to come from TRLN libraries.



**2007 Inaugural Management Academy Class**

## **SINGLE COPY PROGRAM**

The Single Copy Task Group concluded its work on a Single Copy Pilot Program and submitted a final report to the Council of Directors in April. The report included an overview of existing shared print programs and recommendations for a viable, consortia-wide Single Copy Program for TRLN. By the end of the fiscal year, 43 of the 67 pilot titles (a list which included titles from chemistry, health sciences, math, physics and general reference) had been processed into the Program. In June the task group was disbanded and an Operations Committee was appointed to carry the program forward, under the direction of the TRLN Collections Council. Following the recommendation of the task group to expand the Single Copy Agreement from its pilot arrangement between UNC and Duke to the consortium as a whole, TRLN worked with the Council of Directors to formulate a new Memorandum of Understanding (MOU) for the Program, to be signed by the president and/or provosts of each TRLN institution.

The Single Copy Program is designed as a voluntary mechanism for TRLN libraries to reduce within the consortium unwanted duplication of print materials that have low use but enduring value, and distribute the associated benefit of freeing shelf space in libraries. Libraries that contribute material to the Program retain ownership of their volumes and agree to keep them in perpetuity – subject to the Memorandum of Understanding – and to grant perpetual access to TRLN partner libraries through its privileged document delivery network. They also agree to cooperate on cataloging procedures so that the TRLN shared collection (or TRLN Single Copy Archive) is discoverable in Search TRLN and in other potential registries. The TRLN Collections Council, on which the Associate Directors and Associate University Librarians of Collections serve as the steering committee, will set the direction of the Program and oversee the work of the Operations Committee. TRLN will maintain lists of materials contributed to the Program, including the total number of volumes representing potentially saved space in campus libraries and shelving facilities.

Presentations on the Single Copy Program were given at Duke Perkins and UNC University Libraries, as well as at the 27<sup>th</sup> Annual Charleston Conference and the State-Assisted Academic Library Council of Kentucky (SAALCK) Storage Summit. TRLN was also represented on the OCLC RLG Shared Print Working Group – a group evaluating policy frameworks for shared print collections.

## **COLLECTIONS ACTIVITIES**

This year, the TRLN Collections Council concentrated on various aspects of expanding the TRLN digital collection, including digitized and licensed content.

In October, it charged a Digital Media Task Group to assess product options for TRLN and offer advice on appropriate business models for acquiring potential and recommended digital media content. The task group produced a report outlining the state of campus digital media acquisitions, licensing and business model considerations, and made recommendations

including Films Media Group's On Demand service for streaming video. The Electronic Resources Committee (ERC) negotiated the FMG license in May.

In February, TRLN announced that UNC and NCSU had joined the Open Content Alliance (OCA), with cooperation from Duke in digitizing public domain materials for deposit at the Internet Archive. At the request of the TRLN Executive Committee, the council produced a white paper entitled "Large-scale digitization: a TRLN Agenda." The white paper is an internal TRLN document which will serve as a framework for evaluating potential partnerships and seeking external funding in the coming year. An executive summary was made available on the TRLN website.

The ERC held a planning retreat in August to review the operational documents for the committee – including its licensing guidelines and committee procedures, and its goal to increase its portfolio of licensed content. The committee added eight new products this year. In some cases, only one member took advantage of an offer made to TRLN, and in others, subscribing institutions negotiated future discounts for TRLN partners who joined the deal at a later date. The eight new products are:

- Aluka
- BioOne2
- The Chronicle of Higher Education
- Films Media Group On Demand
- Gale Directory Library
- GeoScienceWorld
- Global Health
- Proquest Full-Text Dissertations & Theses

The ERC and the Collections Council together initiated "Collections E-News," an online newsletter designed to keep TRLN bibliographers and collection managers informed of consortial acquisitions and licensing activity, and to solicit their direct input. Visit the archive at <http://www.trln.org/enews/Collections/cnewsarchive.htm> or contact [patti@trln.org](mailto:patti@trln.org) to subscribe.

In September, TRLN issued a press release in support of the Shared E-Resources Understanding (SERU), September 2007, and became the first library consortium to renew BioOne (and subscribe to BioOne2) under SERU's framework. The goal of SERU is to increase access to online journals. Under the SERU initiative, participating libraries and publishers acknowledge a set of shared expectations regarding issues not addressed in current copyright law, saving time on onerous license negotiations.

## EXPEDITED DOCUMENT DELIVERY

We continue to offer expedited delivery and loans of material to users of the TRLN libraries. In addition, faculty, staff and students of one institution may borrow directly from another TRLN institution. Last year, more than 50,000 requests were filled from our collections for TRLN users.

The TRLN Document Delivery Services Committee consulted on two important TRLN initiatives this year – Search TRLN and the Single Copy Program. In both cases, committee members met extensively with project staff to shape and improve document delivery services and documentation associated with each initiative.

## NEW ORGANIZATION – NEW LOOK

Last year we formed a new Collections Council to coordinate our cooperative collection development activities as well as scholarly communications, large-scale digitization of print materials and print and electronic archiving. The membership of this new council was much bigger than past TRLN standing committees, including representation from collection administrators, TRLN's professional school libraries, special collections and scholarly communication. The chair of the Electronic Resources Committee serves as a member of the Collections Council. This new model has worked well for collections. Several task groups were formed for specific projects – implementing Search TRLN, piloting the Single Copy Program – and have been discharged with the completion of those projects. We will build on the success of the Collections Council model to coordinate TRLN's other major program and service areas: Technology, Services, and Human Resources.

**Technology Council:** Coordinates TRLN activities related to digital library initiatives, Search TRLN, library systems, technical infrastructure, digital content management, and associated information technology issues; and oversees the maintenance and development of Search TRLN and the work of the Endeca Operations Committee. This council includes representation from a separately

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## TRLN PROGRAMS

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*The 2007 TRLN Annual Meeting was held in July at the Friday Center in Chapel Hill. Paul Courant, University Librarian and Dean of University Libraries, University of Michigan gave the keynote address and featured author Pamela Duncan spoke at lunch. Over 280 library staff from the TRLN Libraries attended the meeting.*

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*TRLN held two Staff Enrichment sessions featuring speakers on the topics of Preservation, Digital Repositories, Special Collections, and Communications, Marketing, and Outreach. Over 130 staff members attended these sessions.*

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*TRLN held four New Employee Orientation sessions at the Biotechnology Center. One hundred nineteen new library employees at the TRLN Libraries attended these sessions.*

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*TRLN was represented in a program about collaboration at the UNC LAUN-CH Annual Meeting in March.*

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

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administered library, from digital libraries, library systems departments, and the chair of the Endeca Operations Committee.

**Services Council:** Coordinates TRLN activities related to the development, communication, provision and measurement of library public services, and issues relating to reciprocal service arrangements among member libraries; and oversees the work of the Document Delivery Service Committee. This council includes representation from a separately administered library, from circulation, usability, reference and the chair of the Document Delivery Service Committee.

**Human Resources Council:** Coordinates TRLN activities related to human resources, including staff development, training, and other personnel issues; provides opportunities for discussion of issues relating to personnel, staff development and training; and oversees the Staff Development Committee and the Staff Enrichment Series. Representation on this council includes a separately administered library, personnel librarians, and the chair of the Staff Development Committee.

The TRLN website has begun to incorporate the look and feel of the Search TRLN user interface and will undergo further revision as the councils work progresses.



In the coming year, TRLN will continue to make progress on the Digital TRLN initiatives and to maintain the core services that form the basis for our collaboration. Search TRLN will continue to be improved. This service provides a cornerstone that will enable enhanced cooperative activities, and will require close collaboration among staff from our member libraries. The TRLN Management Academy is now an ongoing event. The TRLN Single Copy Archive will grow with the work of the Single Copy Operations Committee, and again will require close cooperation among member libraries.

Working with the expanded membership of our new councils, TRLN will sponsor a copyright symposium and a digital repository forum. We will continue to explore partnerships and funding opportunities for large-scale digitization, provide staff development and training opportunities, and continue and enhance reciprocal services and document delivery.

#### **TRLN STAFF**

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