

TRLN Planning Retreat -- Notes

8-17-06

Present: Kristin Antelman, Carolyn Argentati, Melanie Dunshee, Lolly Gassaway, Deborah Jakubs, Carol Jenkins, Anne Klinefelter, Sarah Michalak, Pat Mullin, Susan Nutter, Wendy Scott, Vickie Spencer, Teresa Stanton, Pat Thibodeau, Meg Trauner, Tom Wall **TRLN Staff:** Mona Coutts and Judy Ruttenberg
Facilitator: Barbara Moran, SILS

Introduction and Overview

Lolly reviewed the retreat agenda and introduced Barbara Moran, and Mona distributed update pages for the planning notebooks.

TRLN Successes

Barbara introduced the discussion of TRLN's successes, both past and ongoing. TRLN has a lot to be proud of, including longevity – TRLN one of the oldest consortia – and the BIS catalog, which was very pioneering.

Successes that are *ongoing*

- Ease of access for users, welcome they receive from each institution
- Cooperative collection development – borne out by recent OCLC WCA report (area studies, e.g.)
- TRLN staff that work on behalf of everyone – e.g. license negotiations, programming
 - Document Delivery – the “TRLN Truck” – since inception of consortium (UNC has contributed that truck virtually free – a good example of member generosity)
- Collaborative staff training
- Informal information sharing – on standing committees, at Annual Meeting, e.g.
- Professional collegial relationships – helpful for recruiting
- Local professional development opportunities
- Leveraging of OCLC for expedited document delivery service
- Culture of competition – pushing each other to do better – (salaries, information commons, e.g.)
- Provosts have gotten engaged – TRLN helped get them together regularly
- Joint licensing
- Opportunities to serve on committees, to contribute to profession of librarianship
- *We move materials around – we should figure out a way to move people around – make a deal with TTA?*
- TRLN staff and member librarians tackle things in a high quality, multi-perspective kind of way – examples of WorldCat and Reduced Print – achieving an economies of scale
- Joint licensing principles
- Opportunities for SILS students – TRLN libraries compete for talent
- Faculty recruiting
- Library cooperation helps joint degree programs – e.g. Biomedical Engineering
- We have more credibility when we write a report or make a statement together

- TRLN has a national reputation – people listen to our statements
- TRLN is a model when our academic programs look at cooperation
- TUCASI money a result of past successes

Past successes that are **done**

- Shared bibliographer for South Asian studies – discussion of Middle East bibliographer is ongoing
- Grant to look at ILL – overtaken by OCLC (that's a good thing)
- Partnering with SILS on the Fellows Grant – bringing the fellows together a few times a year
- Scholarly Communication – e.g. “Declaring Independence” with SPARC, Reducing Print Task Group, Joint letter to Elsevier
- Shared catalogs – prior to WWW access
- ILS review – got staffs up to speed on the issues
- CLR copyright grant

Principles of Cooperation

(See attached “track changes” document for proposed revisions)

- Clarification that local community borrowers are not consortial clients
- Keeping up with E-commerce service/leverage technologies – using the library should be as easy to use as amazon.com – can leverage cooperation to accomplish that – might be expensive individually
- How is our E-service? Users can't currently pay fines online!
- We seek to be competitive with best practices in commercial and non-commercial competitors
- Strengthen communication through branding?
 - Splash screen for TRLN resources – like NC LIVE, or (for print materials) “Brought to you by the TRLN truck”)
 - Duke – “Loyalty Cards” – key rings, example
 - Identify what services people can get from TRLN and advertise in this very simple way
 - Coordinate press releases
 - Marketing to internal staff – awareness of TRLN
 - Add links to TRLN website/e-news to individual news sites
 - TRLN blog? RSS feeds done collaboratively?
- Maybe we should review the principles annually; revise and reaffirm and carry this date forward.

Potential New Projects

Large-scale collections in open content environment (Sarah)

- Wealth of resources in TRLN – what can we do to get our content online
- Large-scale digitization program – share riches, emphasize their availability

- Digitize in considered and orderly fashion
- There's Google and Open Content Alliance – OCA is doing some costing, should re-emerge in October.
- Should TRLN be a partner with Google? Our low amount of overlap demonstrates our viability as a digitization partner/player.
- OCA locating a pod at SOLINET -- would potentially be our regional scanning locale
- TUCASI? RENCI? Is there money for this?

Search TRLN (Kristin)

- Option to put catalogs into metasearch – with a standard look and feel at low cost, but the functionality would be low and performance is poor
- OR we can index our records together
- OR we can use Endeca. Could do it in a way that didn't interfere with ILS layers.
- Fully customizable environment
- Location is a facet – can go up to TRLN or down to the institution
- "Request" is the next logical function to include – could raise issue of direct user borrowing
- Would have to license the software – not a trivial cost
- Endeca recently signed with FCLA
- Would take a full-time person to work on the project
- Lots of issues to resolve as item-level descriptions are converted to facets (format, e.g.)

TRLN Copyright Education Initiative (Lolly)

- Copyright education materials for the campuses
- ARL working with Peggy Hoon at NCSU
- ARL is seeking supportive educational institutions – we should do this as TRLN
- Duke and UNC have scholarly communication staff (dedicated)
- New CCC campus-wide copyright license (covers coursepacks, e.g.)
- Duke is hosting ACRL scholarly communication institute
- Put on agenda of Governing Board

RENCI (Carolyn)

- Context: NSF Data Management Plans in grant applications
- Opportunity for libraries to participate in the future of data management, institutional repositories

Management Institute (Wendy)

- Common workforce planning issue – collection of demographic data
- Higher education context has to be part of the curriculum

Single Copy with Duke and UNC (Deborah)

- Duke and UNC to use LSC to store single copies of long runs of journals
- Program would be “opt-in” – for campuses to commit to storage at their own institutions, to make collections decisions based on copies in the archive
- Could extend to superseded reference materials

Barriers and Solutions

Barbara introduced this discussion by referencing barriers identified in the literature on consortia:

- Physical distance between members
- Need for institutional recognition versus recognition of the whole
- Barbara encouraged a discussion of barriers with regard to the six new potential projects – come up with barriers AND if possible, solutions
- *Overheard: “We’re this close to greatness”*

Barriers	Solutions
Understanding the issues to a sufficient degree to participate	Seminars, information sharing, briefing papers, briefing at Council meetings
Money and budget cycle	Stronger central budget, more advanced planning, dues increases, using central funds to pilot a project or test a product or service.
Local time commitments	Augment TRLN staff with consultants, tap into non-librarian profession or paraprofessional staff in our libraries
Competing resources among institutions (including staff)	Focusing on projects with the biggest impact, partners, grants, etc.
Different perspectives, adequacy of skill sets, conservative nature of librarians – need to be risk-takers	Encourage risk-taking, big idea speaker series to break out of how we do our jobs day to day
Organizational structures: Different institutions have different funding, different timing for readiness to do something	
Committee structures are not nimble enough	Specific project groups – drawing on expertise where it exists – not representative (necessarily)
Organizing leadership through TRLN	Strong central staff, strategic planning
Small size is a barrier in some contexts: Licensing, last – copy	Bring in other partners, consortia, etc. for targeted areas

One group focused on the integration of the proposed six projects – noted that they have individual merit but are strengthened by linking them together under a vision/rubric “TRLN Digitization Project.”

- Strategically work through this using project management expertise
- We have more opportunities than barriers – tremendous amount of expertise
- Would have to learn to live with ambiguity -- some things position us for other projects and are not in themselves results or products or deliverables
- Leadership exists in TRLN – also need grants, library schools, consultants – these people have to feel part of TRLN and our institutions
- Microsoft as a model for integrating disparate projects
- TRLN Suite of E-Services and Content
- TRLN central staff are an asset – hungry and eager for opportunity

Wrap-up (Susan)

- Deanna Marcum – we can’t just be “ready for change” – we have to actually change
- Need to embrace ambiguity
- Avoid incrementalism
- Need to position an organization for its next steps
- Avoid consensus – it doesn’t lead to greatness
- Think big! Large scale TRLN impact
- Create an integrated whole – embrace these ideas and articulate a vision for our staffs
- Vision is seeing an integrated whole, getting people to come with you
- We’re going to do these projects anyway – better and faster to do them together

Next Steps:

- Distribute the notes from this meeting
- Start making agenda items and decisions!
- A vision statement: describe what the user is going to get – the overarching goal of suite of services: Storage, services, discovery tools
- Digital TRLN?
- Graphic to convey TRLN vision
- Tom to draft vision statement and submit to Executive Committee
- Look for principals to participate in new initiatives