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Annual Report

July 1, 2022-December 31, 2023



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From the Executive Director

The physical proximity of TRLN's member institutions has undergirded our consortium since Duke and UNC-Chapel Hill began collaborating on collection development in the 1930s. During the height of COVID, when so much of our work shifted to a virtual format, the significance of that physical proximity seemed to wane.

As we prepared this report, the theme of accessibility emerged – access to spaces, information, expertise, and, most importantly, access to each other. Over the past 18 months, as the impact of COVID is less acute, TRLN has again been able to offer in-person gatherings – opportunities to interact with colleagues in multi-dimensional spaces. Geographic proximity matters again.



While many of our meetings still take place online, we are fortunate to have the option to meet in person. Both of the Annual Meetings included in this report offered virtual and in-person options. We have welcomed the opportunity to again host networking events, social events, professional development activities, and operational meetings on our campuses and in central locations in the Research Triangle Park.

As influences like artificial intelligence, data, digital lending, and remote work continue to transform our profession and our consortium, for the time being at least, hundreds of print books continue to traverse our campuses on a daily basis, just as they did through much of the COVID pandemic, just as they have done for nearly 100 years, thanks to the storied geographic proximity of Duke, NC Central, NC State, and UNC-Chapel Hill.

Note: This Annual Report marks a shift from previous reports in that it covers an 18-month rather than 12-month period, allowing us to align with the calendar year.

Lisa Croucher Executive Director

2022 TRLN Annual Meeting



Danielle Colbert-Lewis (NC Central), keynote speaker Keith Knight, and Jamillah Scott-Branch (NC Central) during Knight's print signing at The Carolina Theatre.



Keynote speaker, Rebekkah Smith Aldrich

The 2022 Annual Meeting featured the first in-person events TRLN had held since January 2020. The Annual Meeting kicked off on Monday, July 11 at The Carolina Theatre in Durham with a screening of an episode of *Woke*, courtesy of Hulu, and keynote from the show's co-creator, writer, and executive producer, <u>Keith Knight</u>, who also is a cartoonist and social activist.

On Monday afternoon, a subset of meeting participants toured the Main Branch of the Durham Public Library (DPL). The award-winning space includes numerous meeting areas, the North Carolina Collection, an auditorium, makerspaces for youth and adults, a sensory calming room, and a multi-sensory environment.

Tuesday, July 12 featured keynote speaker, <u>Rebekkah Smith Aldrich</u>, who spoke about sustainability and resilience in libraries amidst climate change. The afternoon featured a selection of panels and presentations from TRLN colleagues. Recordings from the Annual Meeting are available at <u>duke.box.com/v/2022TRLNannual</u>.

MARC for Archival Description

TRLN offered the Society of American Archivists' course "MARC for Archival Description" on October 17 and 19, 2022 for 28 staff members across the consortium. This course covered the details involved in expressing archival description in the MARC bibliographic format.



Data Departments Meeting

In March 2023, TRLN supported a gathering of about 30 people who work in data departments across TRLN libraries. Hosted at NC State's D.H. Hill Jr. Library, the gathering included a tour of the Data Experience Lab, the South Learning Lab, and Visualization Studio. The tour was followed by presentations by Duke, NC State, and UNC-Chapel Hill on their respective data departments and services, as well as a presentation by TRLN. After lunch, participants had the opportunity to join breakout discussions on topics such as research data management, geospatial data, consultations, instruction, and spaces. This was the first such gathering of data departments of TRLN libraries since before the COVID pandemic. Participants expressed their appreciation for the opportunity to reunite with TRLN colleagues.

Human Resources Seminars

Also in March 2023, representatives from Human Resources departments across TRLN libraries gathered to exchange information and to discuss services, activities, success, and challenges. Given the changes in libraries since the COVID pandemic, especially as relates to staffing, work arrangements, wellness, travel, and professional development, the seminar began with lightning talks focused on four topics: placement of HR within the library's organizational structure, composition of the HR department, top three priorities of the HR department, and current work arrangements. After these foundational presentations, participants discussed a variety of topics that cut across all four institutions, including recruitment, employee engagement, compensation, increasing interest in data analytics and visualization, and inclusion, diversity, equity, and accessibility.

HR staff reconvened in December 2023 for continued information exchange. The December gathering included brainstorming about collaborative professional development opportunities, such as staff enrichment programs on topics ranging from artificial intelligence to wellness; the ASERL BIPOC Leadership Retreat; and outreach to college and graduate students interested in pursuing a career in academic libraries.

Happy Hour

In late March 2023, we hosted a social gathering at the conveniently-located Boxyard RTP. We were fortunate to have beautiful weather for about 20 TRLN colleagues to gather outdoors for conviviality, reunion, and refreshments. While the happy hour did not have an agenda, per se, the goal was threefold: to provide an opportunity for colleagues from all four schools and disparate work areas to get to know each other, to enable participants in the BitCurator Forum Satellite Meeting (held at the Frontier that same afternoon) to debrief the meeting, and to "field test" the venue for a possible larger TRLN event in the future. Guests included staff from special collections, administration, and the Library Service Center.

Employee TRLN Orientation

TRLN held four Employee Orientation sessions in the 2022-2023 year. Approximately 90 employees of TRLN member libraries attended the virtual sessions. The orientation is an informal introduction to the people, priorities, and activities of the consortium. Attendees learn about the activities and services provided by TRLN and about ways to get involved in numerous areas of collaboration. TRLN offers these sessions twice per year to demonstrate to new (and longtime) employees that they are part of a larger Triangle community of academic library professionals.

2023 TRLN Annual Meeting

The 2023 Annual Meeting was held Monday, July 17 via Zoom and Tuesday, July 18 at the Frontier and Top Box of Fullsteam in RTP.

On Monday, the featured speaker, <u>Dr. Sara M. Acevedo</u>, spoke about her work advancing Disability Justice praxis cross-culturally. The afternoon featured a variety of presentations from TRLN colleagues.

Tuesday kicked off at The Frontier with breakfast treats from Monuts. Day Two included presentations from TRLN colleagues, interest group meetings, a workshop, and a watch party for featured speaker <u>Dr. Emily Knox</u>. Dr. Knox spoke about her work in information access, intellectual freedom, and censorship. At Boxyard, TRLN colleagues had a chance to catch up during lunch and at our social gathering after the at the end of the day.

For descriptions of presentations, visit the event page at <u>https://trln.org/event/2023-trln-annual-meeting</u>. Recordings from all sessions on July 17, as well as the featured speaker on July 18, are available at <u>https://duke.box.com/v/TRLNannualmeeting2023</u>.



TRLN Publishes Guidelines for Language Used in Exhibitions

In November 2022, a team of communication experts, exhibit specialists, and librarians from across TRLN institutions published guidelines for producing exhibitions that are inclusive, diverse, equitable, and accessible. "<u>Exhibition Language Guidelines: A</u> <u>Working Document for Academic Library Exhibit Professionals</u>" was developed in response to increased awareness of the role of academic libraries in dismantling racism.

Intended for anyone working on library (or other types of) exhibits, the document includes guidelines on language related to gender orientation and sexual identity; disability; social class and socioeconomic status; age; race, ethnicity, and nationality; and religion and spirituality.

The staff who lead exhibit programs at TRLN institutions have had collegial relationships for several years, but their collaboration and communication intensified during the pandemic, as staff wanted to discuss exhibition work and how programs were adapting to pandemic-related challenges and other societal events.

Each member of the exhibits group took on research and writing responsibilities for different sections of the document, meeting twice per month throughout 2021 to discuss their progress. The group hopes that the guide will benefit not only TRLN institutions but smaller organizations that may not have the resources to develop such a resource.

The authors of the Guidelines presented their work at the 2022 TRLN Annual Meeting. The recording of that presentation is available at <u>https://duke.app.box.com/v/2022TRLNannual/folder/167459261557</u>.

TRLN E-Resources Management Working Group Publishes TRLN Guide to Negotiating Accessibility in E-Resource Licenses

In December 2022, the Electronic Resources Management Working Group (ERMWG) published the <u>TRLN Guide to Negotiating Accessibility in E-Resource Licenses</u>. This guide was created to help TRLN member libraries engage in conversations with vendors around e-resource accessibility. Recognizing that licensing is key to codifying the shared understandings and priorities of vendors and libraries, ERMWG sought to create "a reference tool for library staff involved in licensing and e-resources management as they advocate for strong accessibility assurances in their formal contracts with service and content providers."

While the intended audience for the document is TRLN libraries, ERMWG recognized that all librarians are advocates for the needs of their users, regularly participating in conversations with colleagues and external parties on how best to ensure those needs are met. ERMWG intends to update the guide regularly, not only to document progress but also to address issues that may arise with new platforms, resources, and, most of all, user communities. The guide provides tools to facilitate consistent and impactful communication with vendors with the goal of ensuring that e-resources are accessible to all users.

Access the TRLN Guide to Negotiating Accessibility in E-Resource Licenses at <u>http://bit.ly/trln-a11y-eresource-license</u>.

TRLN Shipping Bags

In Summer 2022, TRLN began using new shipping bags to help staff quickly identify materials being delivered across TRLN member libraries. The <u>Resource Sharing</u> <u>Working Group</u> proposed the purchase of these bags and coordinated the delivery and distribution via the courier van that delivers materials daily across TRLN institutions.



TRLN Discovery Updates

Several updates and enhancements were made to TRLN Discovery. The <u>release notes</u> contain further details, but a few highlights include:

- Bug fixes impacting TRLN Argon 2.0, including several impacting Advanced Search.
- Removed unwanted <dd> elements that caused accessibility and layout issues.
- Created a new field called "Accessibility Notes" that will display in the item page in the "Other Details" section if a record has data in the MARC 532 field.
- Updated subject headings remapping file to incorporate terms discussed and approved by the Metadata Team.

A full list of terms is available at https://github.com/trln/marc-to-argot/blob/main/lib/translation_maps/shared/subject_heading_remappings.yaml.

Project ReShare



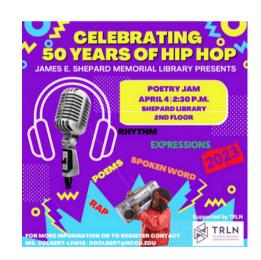
TRLN was one of the founding members of Project ReShare, which was officially launched at a meeting at Swarthmore College in 2018. The Project aims to set the standard for how libraries collaborate, partner, share resources, and connect patrons to information. Since the inaugural ReShare meeting in 2018, TRLN hosted a ReShare planning retreat at Duke in March 2020; and the Steering Committee met twice in Chicago (June and August 2023) and once at the Charleston Conference (November 2023). TRLN staff and staff of TRLN member libraries have served on and chaired various ReShare committees since the project's inception. (See the section on ReShare Implementation Working Group for more more information on TRLN's implementation of ReShare Returnables.)

TRLN IDEA Funding

TRLN chose to support our member institutions' work in inclusion, diversity, equity, and accessibility with project funding launched in Spring 2022. Staff members at any TRLN library could apply for IDEA funding to further their library's and TRLN's goals to establish or advance inclusion, diversity, equity, or accessibility efforts. The Executive Committee approved a total of \$100,000 of funding, which was distributed across two years (two funding cycles per year). For more information on IDEA funding and project proposals, visit <u>trln.org/trln-idea-funding</u>. A summary of the funded projects is below.

A Tribute to Hip Hop: Celebrating 50 Years of Creativity

Submitted by a group of NC Central staff members, "A Tribute to Hip Hop: Celebrating 50 Years of Creativity" was a series of events "celebrating Hip Hop and the culture created by this genre of music and art [celebrating] its 50th anniversary in 2023." The event series started with a book talk with author and journalist Justin Tinslev to discuss his book It Was All A Dream: Biggie and The World that Made Him. Shepard Library then hosted a Poetry Jam moderated by Dr. Zelda Lockhart, Associate Professor of Creative Writing & African American Literature. Original poems were read by students, faculty, and staff of the university community. The final event was an art exhibit and competition consisting of original works that paid tribute to Hip Hop and featuring a performance by NC Central's hip hop dance crew, the Eagle Flight Dancers.



Improving Accessibility for Exhibition Spaces in TRLN Libraries

Submitted by Margaret Brown, Head, Exhibition Services and E. Rhodes and Leona B. Carpenter Foundation Exhibits Librarian, Duke University Libraries on behalf of a team of people working in exhibits across TRLN institutions, "Improving Accessibility for Exhibition Spaces in TRLN Libraries" aims to increase accessibility to exhibitions in TRLN libraries through assessment, discussion and commitment to follow-through on all feasible accessibility work.



Accessibility for exhibitions in libraries is complicated by the nature of the architecture, cases, and collection materials. The exhibition programs in TRLN libraries serve many different audiences and contain a wide variety of formats of materials; spaces and cases were often not designed to be compliant with the Americans with Disabilities Act. Because most exhibitions are temporary and resources and personnel time are limited, the goal of making every instance fully accessible to people with all abilities has often not been achieved. This project included a series of consultations to help our institutions design practical frameworks and prioritization models for the nature of library exhibition programs. Local specifications were one deliverable of this project, but the group is also working toward more general guidelines to share with other libraries.

The team hired an accessibility consultant to visit each library exhibition space and create site specific reports and recommendations. This project is a step toward awareness and a commitment to making accessibility a part of the regular workflow as opposed to an occasional act when practical.

TRLN IDEA Funding Continued

Islamic and Persian Bookbinding Workshop with Yasmeen Khan

Submitted by Erin Hammeke (Duke), "Islamic and Persian Bookbinding Workshop with Yasmeen Khan" will be a multi-day workshop on historic Islamic and Persian bookbindings taught by Yasmeen Khan, Head of Paper Conservation at the Library of Congress.

There are almost 100,000 books in Arabic and Persian languages held across TRLN libraries. This workshop will allow conservation staff to more competently care for collection materials from a wider range of geographic and cultural areas in the Islamic world.

The workshop, scheduled for April 2024, will include lectures on Islamic bookbindings and their conservation. Students will produce an Islamic and/or Persian bookbinding historical model. The class will examine Islamic and Persian bookbindings from Duke's Rubenstein Library collections to learn about their historic and cultural context.

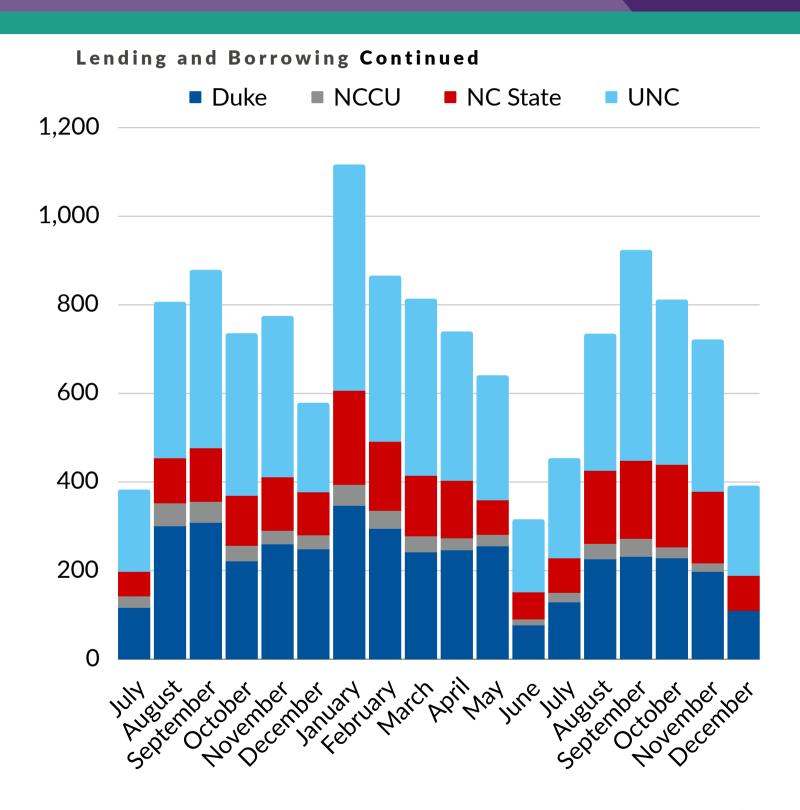
Participants will have a better sense of Islamic material culture and specific language for Islamic bindings, enabling staff to better care for these materials across the TRLN collections.

Lending and Borrowing Reports

TRLN's robust lending program broadens access to and deepens the impact of resources across our institutions. The information below is a snapshot of the lending and borrowing activities between our institutions July 1, 2022 through December 31, 2023.

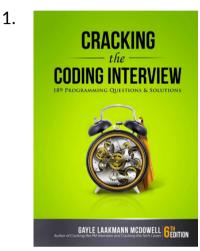
The dashboards that generated this snapshot can be accessed and interacted with at <u>https://trln.org/activities/trln-direct</u>.

Lender	Duke University	North Carolina Central University	North Carolina State University	University of North Carolina at Chapel Hill	Lending Total
Duke University	n/a	10	1,432	1,448	4,118
North Carolina Central University	146	n/a	142	117	556
North Carolina State University	788	3	n/a	579	2,267
University of North Carolina at Chapel Hill	2730	20	1122	n/a	5,920
Borrowing Total	5.702	106	3,958	3,095	12,861

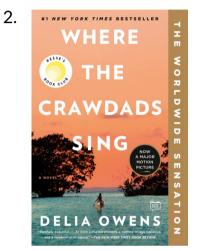


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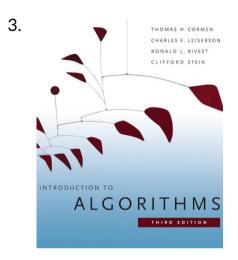
Top 5 Most Requested Titles 2022-2023



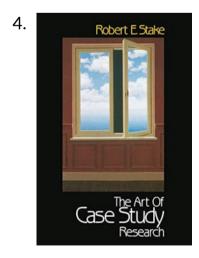
Cracking the Coding Interview by Gayle Laakmann McDowell



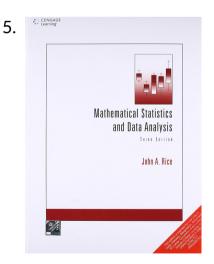
Where the Crawdads Sing by Delia Owens



Introduction to Algorithms by Thomas H. Cormen



The Art of Case Study Research by Robert E. Stake



Mathematical Statistics and Data Analysis by Bessel Van Der Kolk

Working Groups 2022-2023

Working groups exist to develop, implement, or oversee a specific project or product related to TRLN's strategic priorities. They receive a formal charge from the Advisory Council that is reviewed on an annual basis. New working groups may be proposed to the Advisory Council by the Executive Committee, an interest group member, a TRLN staff member, or an Advisory Council member as needs evolve.

The **Electronic Resources Management Working Group (ERMWG)**, currently chaired by Tessa Minchew, is one of TRLN's longest standing groups, having managed all consortial licenses, negotiations, and workflows for many years. This year, ERMWG engaged in a long and complex license negotiation with Oxford University Press (OUP). As in previous years, an MOU was ultimately signed to codify the 2023 OUP University Press Scholarship Online (UPSO) renewal. Other successful renewals included AAAS Science Online, ACS, BioOne Complete (.1 and .2), Chronicle of Higher Education, EBSCO Historical Abstracts, EBSCO America: History and Life, MARCIVE Documents without Shelves, OUP UPSO, SciFinder Academic, and SPIE. ERMWG also took on various e-resource management tasks, including resolution of OUP metadata issues and information sharing about individual institution's perpetual access to Springer content. ERMWG's work on accessibility resulted in the publication of TRLN Guide to Negotiating Accessibility in E-Resource Licenses. The Guide has received notable positive feedback in general with specific interest from NERL and ICOLC. Various members of ERMWG and TRLN staff have done multiple presentations on the accessibility work. Finally, given the greatly reduced portfolio of shared deals across TRLN, ERMWG has engaged in structured discussions about the future of the group, recognizing the value in regular meetings to tap into collective expertise. They have prioritized three categories of future work: best practices, guides, research, and documentation; evolution and outreach; and legacy work and systems.

Working Groups 2022-2023 continued

The **Resource Sharing Working Group** continued to meet on a quarterly basis. The group discussed a number of topics throughout the year, principally the implementation of ReShare, Controlled Digital Lending, and sharing information about workflows.

The group also welcomed several new members and Michael Edwards, Duke's Resource Sharing Librarian, began a term as chair.

The **ReShare Implementation Working Group** formed in June 2022 with a goal of implementing ReShare Returnables in the Summer of 2023. TRLN partnered with Index Data, a longstanding development partner of the ReShare platform and community, to host and implement Returnables, which, as of June, replaced TRLN's former resource sharing platform, Relais D2D.

Working Groups 2022-2023 Continued

The **Shared Discovery Services Working Group** is responsible for the design, continual improvement, and maintenance of our shared catalog. Working group members communicate and consult with staff at all of the libraries at their institution regarding the group's efforts. The Shared Discovery Services Working Group meets every other month to review maintenance and development needs. welcomed a new member -Angela Zoss, Duke's Interim Head, Assessment & User Experience Strategy Department. Angela replaced Emily Daly, who was appointed Duke's Associate University Librarian for Research and Public Services. Sean Aery, Zeke Graves, and Dean Farrell all joined the group as well to contribute their expertise in Blacklight development.

The Shared Discovery Services group is also piloting new roles and responsibilities for team members. Kelly Farrell, TRLN's Program Officer, serves as TRLN Discovery's Product Owner and Genia Kazymova, TRLN's Application Developer, serves as primary Technical Lead. Angela Zoss (Duke), Chad Haefele (UNC, and Kristen Wilson (NC State) serve as Functional Leads. Sean Aery, Zeke Graves (Duke), and Dean Farrell (UNC) serve as the Technical Leads for Blacklight. Derrek Croney (Duke), Adam Constabaris (NC State), Jamie McGarty, and Joe Moran (UNC) serve as Technical Leads for Solr, the ingest application, systems, and/or Amazon Web Services. Lynn Whittenberger (NC State) serves as the Metadata Lead and Andreas Orphanides (NC State) serves as the User Experience Lead. (See the TRLN Discovery section for information on bug fixes and enhancements to TRLN Discovery.)

Leadership Transitions at TRLN Member Libraries

In January 2023, María Estorino was named vice provost for University Libraries and university librarian at UNC. The press release announcing her appointment said, "Estorino has been a leader in academic libraries for more than 20 years. She joined the University Libraries in 2017 as associate university librarian for special collections and director of the Louis Round Wilson Special Collections Library. In that role, she was a member of the University Libraries' leadership team, with a focus on expanding and advancing the work of Carolina's outstanding special collections." TRLN welcomed Maria to the Executive Committee, joining Greg Raschke (NCSU), Joe Salem (Duke), and Theodosia Shields (NCCU) to oversee the execution of TRLN's priorities and plans.



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Shared Priorities 2021–2023

This program plan guides TRLN's activities and resource allocation through 2023. The plan is reviewed annually by the Advisory Council and Executive Committee and is revised as needed.

Guiding Principles

In all of its activities and initiatives, TRLN will:

- promote openness and information sharing, across the consortium and beyond;
- pursue the goal of dismantling racial injustice and inequity in research libraries by considering issues of inclusion, diversity, equity, and accessibility;
- emphasize fiscal responsibility and thoughtful stewardship of resources; and
- make data-informed decisions.

Collaborative Collecting

- Develop a robust, complementary, and accessible collection that takes advantage of members' geographic proximity, serves diverse user communities, and highlights members' unique strengths.
 - Document and communicate widely about members' participation in print retention programs that serve to reduce costs of maintenance and space;
 - Utilize our robust shared index to analyze collections and reduce duplication of print collections, within TRLN and beyond;
 - Continue working toward online access to scholarship and creative licensing of digital resources.
 - When appropriate and mutually beneficial, seek to enter agreements as a consortium, and actively seek opportunities for negotiating agreements with other consortia;
 - Develop and implement licensing guidelines that articulate the importance of accessible electronic resources.

Shared Priorities 2021-2023

Sharing Collections, Scholarship, and Knowledge

- Establish and implement tools and policies to support sharing of materials among and beyond our member institutions.
 - Collect and share data about TRLN resource sharing that may be used for individual library reporting and may inform decisions about shared interlibrary services;
 - Implement Project ReShare;
 - Document and seek opportunities to simplify and streamline circulation policies across TRLN institutions and libraries;
 - Explore controlled digital lending (CDL) and share best practices with consortial and CDL communities.
- Maintain and continually improve the shared index and related discovery applications.
 - Make the discovery experience more inclusive through methods that include remapping problematic subject headings, incorporating variant creator names, and meeting accessibility guidelines;
 - Monitor our Amazon Web Services (AWS) hosting costs and explore opportunities to decrease these expenses while maintaining quality of service.



TRLN colleagues at the 2023 TRLN Annual Meeting social gathering at Top Box of Fullsteam.

Shared Priorities 2021-2023

Sharing Collections, Scholarship, and Knowledge (continued)

- Support member libraries' efforts to increase access to primary resources and scholarship by and about Black people, Indigenous people, and people of color (BIPOC) and pursue opportunities to collaboratively promote underrepresented works.
- Contribute to global efforts to transform scholarly communication into a more sustainable and equitable enterprise.
 - Collect, analyze, and disseminate data about TRLN scholarly communication;
 - Contribute expertise and tools to collaborative projects.
- Develop processes for sharing information across TRLN about licenses and agreements with other consortia.
- Develop and share best practices in licensing and negotiating principles.

Shared Priorities 2021-2023

Building Capacity

- Through seminars, training, the TRLN Annual Meeting, and other activities, facilitate acquisition, application, and exchange of knowledge and skills of individual staff, libraries, and our consortium.
 - Identify selected areas of expertise across our libraries that could be shared and promoted across and beyond TRLN;
 - Identify areas of need for training and professional development;
 - Generate collaborative professional development opportunities to expand cost savings and further spur collegiality among our staff;
 - Develop and communicate a plan for coordinated professional development opportunities;
 - Continuously assess the structure and goals of the TRLN Annual Meeting to ensure that it reflects the work and priorities of member libraries;
 - Promote and amplify the work and interests of BIPOC staff at member libraries.
- Create and pursue opportunities for collaboration with geographically proximate schools of library and information science (LIS) and other local educational institutions, with an emphasis on outreach to and recruitment of people from underrepresented communities and identities.
 - Consolidate and disseminate opportunities for research projects or practica;
 - Participate in career fairs of local public high schools;
 - Consider developing a program to introduce high school students to career opportunities in academic libraries;
 - Collaborate with LIS schools on development of curricula and courses that are informed by the current landscape of academic libraries;
- Deliberately situate TRLN in the context of other consortia and explore how to direct our energy and talent meaningfully.



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