FY15 Action Plan Review

Goal 1: Training and Facilitation Center

NOBLE once again offered a full complement of training and discussion opportunities to our member libraries.

A. We held seven roundtable meetings in FY15: two technical services (spring and fall), one large circulation in the fall and one each academic and public circulation in the spring, OverDrive, and WordPress. In addition we held four other large group meetings: a readers advisory and NoveList session with Duncan Smith, one on Gmail at the time of our conversion, a Google Apps session later in the spring and a meeting at EBSCO in Ipswich featuring product managers and a tour of their data center.

More frequent were small group help sessions in our training room. Twenty-eight of these were held, with topics including Reports, WordPress, Booklist Generator, Acquisitions Reports and sessions directed to libraries' Gmail trainers.

Though not a separate objective, our annual Tech Expo in June featured more presentations by member librarians in addition to NOBLE staff.

B. Five onsite library training and consulting sessions were requested and conducted.

C. Nineteen new screencasts were posted to explain new or revised system functionality. On the Staff Information System, 171 pages were added or updated in the course of the year.

D. The online collaboration space was not implemented in FY15 due both to lack of staff time and security concerns about opening up our WordPress configuration.

E. One large group meeting was conducted on website software alternatives, principally WordPress, and three help sessions.

Goal 2: Lead with technology

While not identified as an issue in our planning, we are happy to have used our technology and skills to streamline the migration of the West Branch Library in Peabody from Library of Congress classification to BISAC in FY15. The tools developed to aid their process including updating catalog information and spine labels, are applicable to other data update uses in all NOBLE libraries.

A. While use of NOBLE services on tablet and mobile platforms was a part of several sessions, no program was dedicated to it. We hope to schedule one in FY16, and have also started a new round of promotion on social media and our public website.

B. A separate session was not held on working with third-party services and Evergreen but the topic occurred in many other sessions.

C. We laid the groundwork for patron record verification activities in FY15, including expiry notices, working with the Circulation Policy Working Group and bringing a policy to Executive Board that was approved by Membership at the annual meeting in May.

D. The ability to print single-item receipts was included in Evergreen release 2.5 that was loaded in June of 2014.

E. Web-based patron self-registration, in reality web-based patron account applications, was implemented in FY15 after partnering with Middlesex Commuity College to test and implement the functionality. The application was displayed at both the MassLNC Conference in May and the Tech Expo in June by NOBLE staff.

F. NOBLE staff members have worked with Kathy Lussier of MassLNC to test and document issues with the early versions of the new Evergreen web-based staff client. The focus in FY15 was the circulation client. NOBLE's Technical Assistant Michele Morgan forwarded 49 reports to MassLNC for bugs, design flaws and missing functionality.

G. The Boolean searching functionality in Evergreen was not ready for testing and implementation.

H. Library-initiated batch-loading of bibliographic records from book jobbers was implemented and used by NOBLE libraries in FY15, in some cases in lieu of full acquisitions module use. Patron-loading functionality is not yet available, parameters for future development are being considered by the Evergreen for Academics group.

I. While Evergreen development for batch-editing of bibliographic records was not available, NOBLE developed a tool to allow some specialized cases of batch editing, including located URLs for electronic resources.

J. NOBLE's move to Google services provides the beginning of reducing the number of logins, as it encompasses email, surveys, shared documents and hangouts for training, and may provide a future platform for calendars and Staff Information System authorization.

Goal 3: Streamline and simplify user access policies

A. A Circulation Policy Working Group was authorized by Executive Board and populated with nine librarians representing a cross-section of library types and sizes, along with an Executive Board liaison. The CPWG examined several issues – acceptance of library barcodes on mobile devices, keeping the patron database up-to-date using expiration dates, examining changes to notice schedules

Not all that needed to be accomplished was achieved in FY15, and the group has reauthorized to finish the work in FY16.

B. The new patron self-registration functionality was in actuality patron pre-registration, requiring approval and verification from staff before becoming active, so changes in the borrowers card policy were not required.

C. A move to a consistent method of authentication across products for patrons continued to be elusive. However, NOBLE was approached by the Mass. Board of Library Commissioners to partner in the MBLC's investigation of the issues in using social media logins for library services in FY15, but the actual investigation was delayed by the MBLC until FY16.

Goal 4: Improve access to data

A. Dashboard access to library statistics was achieved directly through the work of NOBLE staff in FY15, rather than as a core development of the Evergreen community. The new NOBLE Statistics Dashboard was developed over six months and previewed in FY15 for a July 1, 2015 debut and provides access to many statistics not previously available, such as use of OverDrive by material's age group, or not easily accessible, such as what other libraries my patrons are using.

B. The projected focus groups on statistical needs were not held. A session on the new Statistics Dashboard development, designed to explain the current dashboard and gather input on additional needs in September, 2015, was cancelled due to low registration. The topic is a part of FY16 roundtable meetings.

C. Statistics breaking out use of OverDrive materials by library and age group were finally achieved as part of the dashboard development. Type of user was not furnished due to confidentiality concerns.

Goal 5: Coordinate and promote e-content.

A. A detailed search for funding for a research ebook collection was not pursued due to the new MLS Commonwealth ebook rollout, and the diversity of ebooks collections currently in use by NOBLE libraries.

B. Investigation and recommendation of a discovery service was put on hold pending the results of a similar investigation on the state level. NOBLE staff did assist three member academic libraries in their individual implementations of EBSCO's discovery service.

C. The NextReads service of email notifications of books in over 20 genres was successfully migrated to EBSCO's new LibraryAware platform early in FY15.

D. The LibraryAware library PR platform was investigated, including a discussion with EBSCO vice president Duncan Smith, who oversees the service, at NOBLE. At this point, the product is best suited to individual library implementation, there is no real option for a shared implementation of the PR aspects of the product.

E. An OverDrive API for Evergreen was developed by the SITKA consortium in British Columbia but not immediately adopted into Evergreen core due to the different programming language used. NOBLE will pursue the progress on the development and test as available.

Goal 6: Provide continuity of knowledge and service.

A. End-of-life switches at public libraries, and the central site router, were replaced in early July, 2015. The RFP and vendor selection process began in October, with the issuing of an RFP which received two responses. On the basis of the significant difference in installation and ongoing costs, installation of the new equipment by a new vendor was delayed until after the expiration of our existing maintenance contract, following significant preparation work in May and June.

B. Release 2.5 of Evergreen was installed on June 17, 2014.

C. Evergreen release 2.6 was installed on January 14, 2015.

D. The Systems Manager and the Member Services Manager switched to portable Chromebooks during the year, in line with our move to Google email and apps. We also acquired and experimented with a Chrome management license and demonstrated for libraries how they could set patron Chrome machines into kiosk mode to minimize ongoing equipment management costs in place of using Windows-based PCs.

E. NOBLE staff researched to find better ways to host our libraries' collections in NOBLE Digital Heritage. A plan was developed for a different way of implementing open source Omeka to give more options to our libraries while remaining under a shared NOBLE umbrella and being fully compatible with the Digital Commonwealth and the Digital Public Library of America. The revised hosting plan was not implemented by year's end, due to Google conversion and dashboard development.

F. We investigated options for hosting our Evergreen system with Equinox, our Ever-green support and development vendor. The costs were in excess of acquiring new Evergreen equipment. In addition, the reliance on interstate internet for every circu-lation transaction removed too much response time variability from NOBLE and Equinox control. A further reason for investigating the issue was the possibility of a move to other office space in light of our coming lease expiration, and the age and reliability of our computer room HVAC system. We were able to renew our lease here at a favorable rate, and the renewal included a new computer room HVAC system at no cost to us, removing those issues. In the end, the annual cost of remote hosting was fully half of the cost of renting our entire existing space, so there was no economy from the move.

G. In FY15, the Mass. Board of Library Commissioners eliminated network LSTA grant opportunities for server and telecommunications upgrades and replacement, in favor of providing an annual infrastructure subsidy. We received $16,558 in infrastructure funds in FY15 which will help to fund our Evergreen server upgrade.

Goal 7: Advocate for members.

A. NOBLE worked with MassLNC to advance and fund several significant software development projects in FY15. MassLNC has been a leader in testing and seeking improvements in the Evergreen staff client's move to a web package in place of a dedicated software client. MassLNC also sponsored software development to eliminate negative balances in patron accounts that is part of release 2.9. Better display of alerts in the web client and a revision of the patron registration screens in the web client were also funding priorities. The MassLNC development committee also helped to determine specifications for a popularity metric as part of the relevance ranking in the web catalog.

NOBLE development funds were used to improve workflow in the acquisitions module.

NOBLE staff also participated in the virtual Evergreen group Evergreen for Academics to encourage development needed by NOBLE libraries.

B. The Executive Director and the Member Services Manager presented to the North Shore Computer Society in May on mobile use of NOBLE.

C. NOBLE participates in the Digital Commonwealth and the Digital Public Library to assist our members and further goal of libraries sharing digital information. Member

Services Manager Elizabeth Thomsen was elected President of the Digital Commonwealth in FY15 and is in charge of the Digital Commonwealth's social media efforts and participated in a session at Wakefield's Beebe Library to encourage participation by current and prospective members.

D. No new libraries expressed interest in NOBLE membership in FY15.

E. No publicity of mobile catalog interface was conducted in FY15 on traditional and social media, but publicity was done in FY16; see also 7.B.

In addition to the original objectives, NOBLE staff furthered work with the MassLNC community by presenting at the MassLNC 2015 Conference in June: Ron Gagnon, Elizabeth Thomsen, Martha Driscoll and Christine Morgan each presented.

Ron Gagnon spoke at the American Library Association Annual Conference in San Francisco in June on NOBLE's Evergreen implementation at a session entitled "A View from the Top: Evergreen" detailing the open source implementation and administration from a manager's viewpoint.

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