
Goal 1. Training and Facilitation center

Improve service in NOBLE libraries by enhancing library staff knowledge on current library and technology topics by providing a full program of training, discussions and a clearinghouse for sharing library-produced materials

Actions	Timeframe for Activity	By Whom (optional)
<p>A. Conduct at least six roundtable meetings.</p> <p><i>Six roundtables were held in FY19:</i> <i>9/18/2018 OverDrive Roundtable</i> <i>10/2/2018 Local History Roundtable</i> <i>2/26/2019 Circ Roundtable (Public)</i> <i>3/14/2019 Tech Services Roundtable</i> <i>5/2/2019 Circ Roundtable (Academic)</i> <i>5/7/2019 Holds Roundtable</i></p>	June 30, 2019	Member Services Manager
<p>B. Offer two half-days of onsite training/consulting to each member library.</p> <p><i>28 training/consulting sessions were conducted at 18 member libraries in FY19: Beverly, Danvers, Endicott, Everett, Gloucester, Gordon, Lynn, Lynnfield, Northern Essex, Peabody, Phillips, Salem, Salem State, Saugus, Stoneham, Swampscott, Wakefield and Winthrop.</i></p>	June 30, 2019	Member Services Manager
<p>C. Develop new online training materials for new functionality and services in Evergreen and other NOBLE services and revise existing for improvements.</p> <p><i>As we prepared for the move to Release 3.2 and the web client in June, new training material/documentation for logging in to the training system and setting things up to make sure that everyone who covers circulation had training and experience and was ready for the change was added. Information on setting up the Chrome browser options for the web client, installing some useful Chrome extensions to clear cache, manage tabs and control printing, setting up and managing workstations, column settings, receipt templates, copy templates and other configurations and settings was included. We also created new material on basic web client navigation and changing users, which are useful for training new hires.</i></p> <p><i>Release 3.2 also brought a number of new features to our users -- more than a standard release because most of the enhancements in the past few releases had been only in the</i></p>	June 30, 2019	Member Services Manager

<p><i>web-client. We created training material and documentation for those, and revised other documentation to adapt it to the changes in the client. This work continued into FY20 as we made changes in configurations and others based on staff feedback.</i></p> <p><i>We are continuing to move documentation and training material into the Google Docs format for easier printing and to make it easy for libraries to copy and adapt NOBLE documentation for their own use. We also created captioned screencasts for some basic circulation functions before we came up on the web client and this work continues in FY20.</i></p>		
<p>D. Develop and present training on Evergreen, Google apps and other topics to include both hands-on at NOBLE and remote online training options.</p> <p><i>In January, a large group presentation called "Evergreen: Looking Ahead to Release 3.1, 3.2 and the Web Client" was held in preparation for the move to the web client. In May, we presented two in-person training sessions on Evergreen Configurations as part of our preparation for Release 3.2 and the web client, as well as sessions on Serials and Acquisitions. This was in addition to several training/consulting sessions at individual libraries. Two weeks after the upgrade, we had two "Ps and Qs Sessions" at NOBLE, to deal with problems and questions from staff relating to configuration issues and various processes. This was partly training as well as resolving browser and configuration issues, identifying bugs and other problems, and updating documentation as needed. (This work continued beyond June 30.)</i></p> <p><i>In April we did a training session on Understanding the Evergreen Catalog, an overview of all aspects of the catalog, with updated documentation. We did two half-hour online sessions of NoveList Select, which is one component of the Understanding the Evergreen Catalog session.</i></p>	June 30, 2019	Member Services Manager
<p>E. Hold a Tech Expo in the spring to highlight recent and forthcoming changes in library technology, including large group and hands-on presentations.</p> <p><i>Our annual Tech Expo was held on June 4th at NOBLE. Sessions included implementing the new Evergreen staff client (live later that week); other improvements in the new release on June 10th, and other future releases; providing technical support and training for library users by a panel of librarians from NOBLE libraries; privacy and confidentiality best practices; keeping track of digital assets such as social media sites, Google assets and license keys; updates on NOBLE tools, including catalog headers and List Maker; and understanding equipment that connects your library to NOBLE and the world.</i></p>	June 30, 2019	Management Team with NOBLE Staff

<p>F. Participate in planning, presenting and attending the annual MassLNC conference.</p> <p><i>Due to the resignation of the Project Coordinator and the transition of MassLNC, no annual conference was held.</i></p>	<p>November 30, 2018</p>	<p>NOBLE Evergreen Staff</p>
<p>G. Develop and present two large-group presentations on new or updated services supported by NOBLE.</p> <p><i>Four large-group meetings were held in the meeting room:</i> <u>NOBLE services</u> 4/4/2019 Understanding the Evergreen Catalog 5/15/2019 Collection Management <u>Other meetings</u> 12/4/2019 OpenAthens Demo 5/30/2019 Climate Cafe</p>	<p>May 31, 2019</p>	<p>Member Services Manager, Systems Manager and staff</p>
<p>H. Promote and conduct “Welcome to NOBLE” sessions for new key staff members at NOBLE libraries as requested.</p> <p><i>Five “Welcome to NOBLE” sessions were conducted in FY19.</i></p>	<p>June 30, 2019</p>	<p>Management Team</p>
<p>I. Upgrade projection equipment in meeting room and monitor in conference room with funding approved by Executive Board from capital fund.</p> <p><i>A new wireless laser projection system was installed in the meeting room late in FY18 with an improved sound system, as well as a new monitor in the conference room.</i></p>	<p>August 31, 2018</p>	<p>Management Team and Administrative Assistant</p>
<p>J. Replace meeting furniture with an emphasis on ease of arrangement by staff with funding to be approved by Executive Board from capital fund.</p> <p><i>Old heavy folding tables were replaced with 12 new rolling tilt tables to facilitate room setup in August, 2018.</i></p>	<p>August 31, 2018</p>	<p>Management Team and Administrative Assistant</p>
<p>K. Replace training furnishings for flexibility and easy storage in new shared room model with funding approved by Executive Board from capital fund.</p> <p><i>Training PC counter tables were replaced in August, 2018, with four matching rolling tilt tables to facilitate setup and conversion from training to meeting. Old counters were reused in Member Services area. New all-in-one PCs were also acquired to replace PC towers, with funds from the MBLC Infrastructure grant, in late June, 2018.</i></p>	<p>August 31, 2018</p>	<p>Management Team and Administrative Assistant</p>
<p>L. Conduct an annual review of basic knowledge and NOBLE policies for heads of technical services and circulation supervisors identified annually by library directors.</p> <p><i>Email lists were established for both of these designated contact groups. We held five hands-on training sessions for the</i></p>	<p>December 31, 2018</p>	<p>Member Services Manager</p>

<p><i>designated cataloging contacts in November, 2018 -- most cataloging contacts attended and we followed up with the rest individually. However, with the impending upgrade to Release 3.2 and the move to the web client, most of the issues and discussion with both groups focused on questions about the many new features (copy tags, copy alerts, preferred names, emergency closings, etc.), new interface, template issues and management of logins and workstations in a web client environment.</i></p> <p><i>During FY20, we will use online sessions to review the relevant policies and procedures with the designated representatives of each group.</i></p>		
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Goal 2. Lead with technology

Provide technology leadership to NOBLE libraries by highlighting new technologies through demonstrations, meetings and trials and seeking group purchases where advantageous. Library staff input will be sought in new technology initiatives through roundtables, email, working groups and participating in MassLNC Evergreen development process.

Actions	Timeframe for Activity	By Whom (optional)
<p>A. Implement new Evergreen web-based staff client modules as available, providing documentation and support.</p> <p><i>The implementation of the new web client was a full-year effort involving NOBLE staff and member librarians. Although the web client was available after release 3.1 was loaded in January 2019, ongoing development and bug fixes made it logical to wait until 3.2 to roll it out in production.</i></p> <p><i>While staff were testing, filing bug reports and learning the new client, the web client was a constant topic at the range of meetings, particularly circulation and technical services meetings and training.</i></p> <p><i>After months on the training system, the production system came up on release 3.2.4 on June 10, 2019 with no provision to use the XUL client. All staff functions moved to the web client exclusively.</i></p> <p><i>While bugs and questions remained, many were covered in Ps and Qs (Problems and Questions) session scheduled over the summer, and the launch was successful.</i></p>	March 31, 2019	Member Services Manager, Systems Manager and respective staff
<p>B. Update a roadmap for NOBLE priorities in Evergreen development, in consultation with working groups and roundtables.</p> <p><i>The objective is being addressed in our FY20 work, we have begun discussions with the Electronic Resources and Database Working Group, will be implementing a new ideas site and conducting focus group meetings.</i></p>	June 30, 2019	Management Team
<p>C. Work with the Mass. Board of Library Commissioners and telecomm vendors to investigate affordable ways to improve Internet bandwidth to meet standards recommended by the American Library Association.</p> <p><i>Working with our telecommunications vendor for public library connectivity, Comcast, we were able to increase bandwidth by 50%, from 50 Mbps download to 75 Mbps while lowering ongoing costs and improving branch service from 25 Mbps to the same 75 Mbps. This level of service is still less than the 100 Mbps recommended for most of our public libraries but a significant improvement.</i></p>	June 30, 2019	Executive Director

<p>D. Investigate and test methods to streamline patron batch loading.</p> <p><i>A description and functional requirement of a batch patron feature has been on the Evergreen wiki since 2014. The next step to implement improvements would require a commitment of development money to build the necessary interface.</i></p> <p>https://wiki.evergreen-ils.org/doku.php?id=student_success_working_group:batch_patron_functions</p> <p><i>Batch loading is currently accomplished with a set of perl scripts that are run on files that are sent by colleges to NOBLE. While this system works well, a batch loading interface would allow libraries to manage the loading of records and resolve problems that arise like duplicate barcodes.</i></p>	<p>June 30, 2019</p>	<p>NOBLE Evergreen Team</p>
<p>E. Investigate and test methods to streamline batch loading of MARC bibliographic records.</p> <p><i>The loading of larger batches of records was achieved with no impact on the system, which has improved the situation somewhat. Additional development work is still needed to expedite the processing, particularly of records for electronic resources.</i></p>	<p>June 30, 2019</p>	<p>NOBLE Evergreen Team</p>
<p>F. Investigate and test OverDrive’s “Get a Library Card” service to make it easier to get a library card and expand the constituencies of NOBLE libraries.</p> <p><i>OverDrive’s cell-phone-based patron verification service was explored and discussed with OverDrive, other Evergreen consortia leaders and other Mass. networks, and the combination of cost and privacy concerns outweighed the potential advantages.</i></p>	<p>April 30, 2019</p>	<p>Member Services Manager with Evergreen Team</p>
<p>G. Participate in Evergreen community software development and improvement efforts including bug-squashing events by filing bug reports, testing submitted fixes and submitting software patches.</p> <p><u>September 10-14, 2018</u> <i>NOBLE participants included: Christine Morgan, 1 new bug reported, 7 comments on bugs Michele Morgan, 2 new bugs reported, 6 comments on bugs, 2 patch signoffs Beth Willis, 4 comments on bugs, 1 patch signoff</i></p> <p><u>March 4-8, 2019</u> <i>NOBLE participants included: Christine Morgan, 3 comments on bugs Michele Morgan, 1 new bug reported, 41 comments on bugs, 2 patch signoffs Beth Willis, 3 comments on bugs, 3 patch signoffs</i></p>	<p>June 30, 2019</p>	<p>NOBLE Evergreen Team</p>

<p><u>May 20-24, 2019</u> NOBLE participants included: Martha Driscoll, 1 comment on a bug, 1 patch submitted (1818144) Christine Morgan, 2 comments on bugs Michele Morgan, contributed 1 patch committed (774707) Suzanne Paterno, contributed 1 patch committed (1777184) Beth Willis, 1 comment on a bug</p>		
<p>H. Work with MassLNC and the Evergreen community to improve course reserves functionality and seek better integration with Evergreen.</p> <p><i>In February 2019 Equinox Open Library Initiative was contacted about Koha's implementation of course reserves. Galen Charlton suggested that instances of Koha for each library would provide the following features:</i></p> <ul style="list-style-type: none"> • <i>maintain lists of instructors as Koha patron records, optionally having them batch imported from campus information system exports</i> • <i>maintain lists of courses, departments, and academic terms</i> • <i>import (via batch or on-the-fly Z39.50 lookup) cataloging records from Evergreen and let items be placed on reserve</i> • <i>upload files for electronic content attached to course reserves records</i> • <i>provide a public interface listing available courses</i> <p><i>Galen commented that further development of Evergreen and Koha could make integration smoother including:</i></p> <ul style="list-style-type: none"> • <i>allowing Koha to authenticate patrons against Evergreen</i> • <i>dynamically pulling in item availability information from Evergreen to display in Koha</i> • <i>teaching Koha to associate courses with Koha libraries rather than have a global course list per Koha database. Doing this would cut back on the number of Koha databases required.</i> • <i>work to streamline importing records from Evergreen</i> • <i>potentially provide some additional access controls for electronic course content</i> <p><i>Galen offered to set up a demo Koha system and arrange a brief training session with stakeholders to see if Koha could be a plausible solution. He also suggested working up a proposal to provide consulting services.</i></p>	<p>June 30, 2019</p>	<p>NOBLE Evergreen staff</p>
<p>I. Advocate with vendors for beneficial pricing for member libraries for a variety of services of interest to our libraries through group purchase contracts.</p> <p><i>Discounted group purchase contracts and opportunities provided by NOBLE include additional EBSCO databases and services, Dell PCs (at a cost 20% lower than the state contract), barcode readers, receipt printers, Envisionware PC management and print management systems and Wowbrary new item alert service.</i></p>	<p>June 30, 2019</p>	<p>Executive Director and Administrative Assistant</p>

<p>J. Expand the synonym ability in our Evergreen catalog by implementing a second instance to accommodate multi-word phrases.</p> <p><i>In March 2018 testing was done to create a dictionary that related phrases to single words. The following phrases were setup in a test system:</i></p> <pre> one hundred : 100 rain forest : rainforest kum quat : kumquat eight hundred : 800 </pre> <p><i>After reingesting records, we discovered that word proximity was not honored. In the example for "rain forest" any record containing the words "rain" and "forest" would get "rainforest" in the index vector even if "rain" and "forest" were not next to each other in the record.</i></p> <p><i>Another issue was the use of integers in the phrases. The example "one hundred" was not indexed because we applied this dictionary to asciword, asciihword, and hword_asciipart and not integers.</i></p> <p><i>Further work may reveal a way to resolve the proximity problem. The consequences of applying the dictionary to integers also needs to be considered.</i></p>	<p>June 30, 2019</p>	<p>Member Services Manager with Evergreen Team</p>
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Goal 3. Streamline and simplify user access policies.

Streamline and simplify use of NOBLE services by reviewing and developing policies that improve access for users, ease of applicability for staff and greater uniformity to improve service and implementation.

Actions	Timeframe for Activity	By Whom (optional)
<p>A. Combine and integrate existing NOBLE policies into a more cohesive policy manual and propose language to fill gaps and resolve discrepancies.</p> <p><i>Major review and integration of NOBLE policies continued in FY19.</i></p> <p><i>At the November Members Meeting a new <u>Record Retention Policy</u> was voted unanimously to replace the <u>Overdue Cleanup Policy</u>, the <u>Patron Record Verification and Purge Policy</u> and the <u>Policy on Missing Items</u>. Also at the November meeting, the <u>G Suite Account Policy</u> was voted to replace the <u>Personal Accounts Policy</u>.</i></p> <p><i>The <u>Borrowers Card Policy</u> was updated at the March Members Meeting by a unanimous vote.</i></p> <p><i>The outdated <u>Winter Meeting Policy</u> was deleted by unanimous vote at the Annual Meeting in June.</i></p> <p><i>The first two policy revisions were recommended by the Resource Sharing Working Group. The RSWG also had another package of consolidations approved by Executive Board in May but a question from a librarian about the current policy revealed some additional clarity was needed in the revised policy so formal passage was delayed until the fall after RSWG review.</i></p> <p><i>Once the updates are completed, they will be integrated into a more cohesive policy manual.</i></p>	<p>May 31, 2019</p>	<p>Executive Director, Member Services Manager and Systems Manager with Executive Board</p>

Goal 4. Improve access to data

Improve access to management statistics through automated reports, an improved custom reports interface and automatic ongoing accessibility of current data.

Actions	Timeframe for Activity	By Whom (optional)
<p>A. Develop a roadmap to prioritize development for the Statistics Dashboard.</p> <p><i>A roadmap document for the dashboard does exist but should probably be re-packaged for public display. This is an internal working document that currently has no prioritization assigned to improvements.</i></p> <p>https://docs.google.com/document/d/1z0FJhYYIB4cGehYnDzUdJpqlIBjursXsS4xEsd4LN_8/edit</p>	May 31, 2019	Systems Manager, Member Services Manager and Systems Support Specialist
<p>B. Provide catalog usage statistics in the statistics dashboard, including number of searches, most popular searches and no-hits in order to guide development and improve effectiveness of the catalog.</p> <p><i>Matomo software was installed on the web server in January 2018 as a test to see what setup would be required.</i></p>	May 31, 2019	Systems Manager, Member Services Manager and Systems Support Specialist
<p>C. Integrate Digital Heritage usage statistics in the Statistics Dashboard.</p> <p><i>Matomo software was installed on the web server in January 2018 as a test to see what setup would be required. A log file from Dec 2017 was loaded in and a snippet of code was added to the header for Digital Heritage. Matomo has been gathering stats for Digital Heritage. Matomo offers a complex portal and needs to be evaluated to see if it provides what we need or is more complex than we need. How libraries access this data also needs to be evaluated. Discussion of a short-term solution to put some basic catalog usage statistics on the Dashboard has been discussed. A meeting to define what to count and how to count is needed.</i></p>	June 30, 2019	Systems Manager, Member Services Manager and Systems Support Specialist
<p>D. Work with member libraries seeking to implement software to manage electronic resources and compile and analyze usage.</p> <p><i>After investigating Coral and Springshare in prior years and having a dedicated webinar on RedLink, our first library, Merrimack College, signed up with RedLink.</i></p>	June 30, 2019	Management Team

<p>E. Develop an interface and coding to provide access to hourly circulation information in the Statistics Dashboard</p> <p><i>Hourly circulation statistics can become complicated to present on a static web page. The number of hours to cover and the patron and item categories to include would make for very long or wide charts. Instead we decided to create a tool that allows libraries to plug in their criteria for the specific stats they need. Suzanne has been re-purposing the ListMaker screens and logic to query Evergreen.</i></p>	<p>June 30, 2019</p>	<p>Systems Manager, Member Services Manager and Systems Support Specialist</p>
<p>F. Investigate and integrate acquisitions data into the Statistics Dashboard, including funds data with password protection</p> <p><i>The integration of acquisitions data into the Statistics Dashboard was not achieved in FY19.</i></p>	<p>June 30, 2019</p>	<p>Systems Manager, Member Services Manager and Systems Support Specialist</p>
<p>G. Incorporate statistics from websites, including library websites, the Staff Information System and the NOBLE public website into the Statistics Dashboard.</p> <p><i>Statistics from websites were not incorporated in FY19.</i></p>	<p>June 30, 2019</p>	<p>Systems Manager, Member Services Manager and Systems Support Specialist</p>
<p>H. Incorporate statistics from EBSCO databases, including NoveList Plus, into the Statistics Dashboard.</p> <p><i>EBSCO database statistics were not incorporated into the Statistics Dashboard in FY19.</i></p>	<p>April 30, 2019</p>	<p>Systems Manager, Member Services Manager and Systems Support Specialist</p>
<p>I. Investigate implementation of serials data into Statistics Dashboard</p> <p><i>A link to a spreadsheet of serial titles was added to the Dashboard in June 2018.</i></p>	<p>June 30, 2019</p>	<p>Systems Manager, Member Services Manager and Systems Support Specialist</p>
<p>J. Incorporate statistics of Precats into the Statistics Dashboard to facilitate their resolution.</p> <p><i>A link was added to the Collection page of the dashboard in September 2019 for a report of precats that is prepared daily for each library.</i></p>	<p>June 30, 2019</p>	<p>Systems Manager, Member Services Manager and Systems Support Specialist</p>
<p>K. Identify and incorporate statistics from self-check stations into the Statistics Dashboard.</p> <p><i>Statistics from self-check stations were not incorporated into the Statistics Dashboard in FY19.</i></p>	<p>June 30, 2019</p>	<p>Systems Manager, Member Services Manager and Systems Support Specialist</p>

Goal 5. Coordinate and promote e-content

Coordinate a cooperative e-content collection for NOBLE libraries of all types to improve ease of access and control costs. Participate in statewide e-content efforts, advocating for the needs of NOBLE libraries and improved access.

Actions	Timeframe for Activity	By Whom (optional)
<p>A. Work with the Electronic Resources and Database Working Group (ERDWG) to evaluate the continuing usefulness of the EBSCO online periodicals package and make a recommendation to Executive Board</p> <p><i>ERDWG reviewed usage statistics and discussed the EBSCO renewal at their November, January and March meetings. After review EBSCO's pricing offer, ERDWG voted in March to recommend to Executive Board renewal of the current package for three years. The recommendation was approved by Executive Board and forwarded to Members, where it was approved unanimously.</i></p>	May 31, 2019	Executive Director, Member Services Manager and ERDWG
<p>B. Work with EBSCO to get optimal pricing on a renewal package of EBSCO databases, catalog enhancement services and readers advisory database.</p> <p><i>EBSCO presented us with a very favorable three-year renewal offer of 2% increase per year. Our costs continue to be far below market rates.</i></p>	April 30, 2019	Executive Director
<p>C. Work with interested libraries seeking better integration with academic authentication sources to streamline use of electronic resources.</p> <p><i>No progress was made in FY19. We are exploring options for improvement in FY20, including LDAP improvements and OpenAthens.</i></p>	March 31, 2019	Systems Manager
<p>D. Evaluate impact of additional budgeted OverDrive funding and work with Executive Board to make a budget recommendation for FY2020.</p> <p><i>The significant increase in OverDrive funding in FY18 brought noteworthy results</i></p> <ul style="list-style-type: none"> • <i>Holds ratio on top 20 titles decreased from 25 to 1 in FY15 to 12 to 1 in FY18</i> • <i>Titles with a holds ratio greater than 5 to 1 decreased from 28% in FY16 to 16% in FY18</i> • <i>Checkouts per unique user increased from 10 in FY16</i> 	September 30, 2018	Executive Director and Member Services Manager

<p><i>to 15.75 in FY18 (increased maximum)</i></p> <p><i>Executive Board recommended a 10% increase in assessed funding for FY20, plus the elimination of library allocations, providing funding for a magazine collection and improvement in ebook and audiobook funding. The recommendation was adopted by membership.</i></p>		
<p>E. Study results of Mass. Library System Commonwealth Ebook Collection changes and work with the Electronic Resources and Database Working Group (ERDWG) to make a recommendation on participation.</p> <p><i>The Commonwealth Ebook Collection moved from Axis 360 to OverDrive in FY19 and joined in with the OverDrive RLA resource sharing effort among Mass. networks. There was no participation decision required as they moved to our platform.</i></p>	<p>September 30, 2018</p>	<p>Executive Director and Member Services Manager with ERDWG</p>
<p>F. Study results of Mass. Board of Library Commissioners' group purchase of databases and work with the Electronic Resources and Database Working Group (ERDWG) to determine a course of action if needed.</p> <p><i>The state database package continued with Gale/Cengage as in prior years, no action was required.</i></p>	<p>December 31, 2018</p>	<p>Executive Director and Member Services Manager with ERDWG</p>

Goal 6. Provide continuity of knowledge and service

Maintain and improve NOBLE services, including the shared library system, web services, telecommunications and training, for the betterment of our member libraries and their users. Continuity of service, support, technology leadership and training will be maintained through a staff of adequate size that is well-trained, equipped with current tools, facilities, learning opportunities and knowledge, and competitively remunerated.

Actions	Timeframe for Activity	By Whom (optional)
<p>A. Maintain currency of Evergreen software by implementing new features in Release 3.2.</p> <p><i>Evergreen Release 3.1 was implemented on the production system on January 9th.</i></p>	January 30, 2019	Member Services Manager, Systems Manager and Executive Director
<p>B. Investigate and implement Evergreen Release 3.3.</p> <p><i>Evergreen Release 3.2 came live on the production system on June 10th. This release marked our change to exclusive use of the web staff client.</i></p>	June 30, 2019	Systems Manager, Member Services Manager and Executive Director
<p>C. Implement full cross-reference authority control for browse searching in the catalog.</p> <p><i>Implemented as part of Release 3.0 (January 2018)</i></p>	June 30, 2019	Member Services Manager and staff
<p>D. Investigate and test cloud-hosting of Evergreen servers.</p> <p><i>We continue to look for a cost-effective hosted solution. In August we received a quote from MOBIUS, a Missouri non-profit operating Evergreen for 40 libraries covering 100 branches. The lowest cost alternative offered was over \$150,000 per year, using Google Cloud Platform. This was in excess of what we had been quoted by Equinix in prior years on their own servers. The structure of Evergreen makes it difficult to adapt directly to the mainstream cloud hosting services, requiring much adaptation that would greatly complicate NOBLE staff implementation without a knowledgeable intermediary.</i></p>	February 28, 2019	Systems Manager and staff
<p>E. Investigate and test cloud-hosting of websites and other services to reduce costs and improve reliability.</p> <p><i>No progress was made on cloud-hosting. We did complete conversion to JetPack which provides automatic cloud backup and restore for WordPress websites which also increases reliability.</i></p>	March 30, 2019	Member Services Manager and Systems Manager

<p>F. Evaluate results of MARC record provider change from OCLC to SkyRiver and issue a report.</p> <p><i>We compared a year of temp bibliographic records from when we were using OCLC with a year of temp records after moving to SkyRiver. The hit rate for OCLC was higher, 85% compared to 70% for SkyRiver. Both databases have similar issues with data quality and duplication.</i></p> <p><i>We are mitigating the difference in hit rate by making some changes to our cataloging system, in a changing environment. An increasing number of records are loaded from files provided by materials vendors, and we've made changes in the way we identify which of these need to be overlaid by NOBLE staff. In addition, more libraries are getting some records from the Library of Congress via Z39.50 as an alternative to entering temp records manually -- this is both more efficient to the cataloger and results in better quality records entering the database.</i></p> <p><i>During FY20, we will be giving library catalogers access to getting records from SkyRiver and other targets via Z39.50, for efficiency at the local level and better records entering the system. As with the item vendor records, we will be relying on more refined algorithms for identifying brief records that need to be overlaid with a fuller record or need original cataloging.</i></p>	<p>April 30, 2019</p>	<p>Member Services Manager, in consultation with Executive Director</p>
<p>G. Evaluate results of changes in Evergreen software maintenance contract and issue a report.</p> <p><i>For FY19 we reduced our Evergreen software maintenance contract coverage with Equinox from full maintenance to an annual review with calls billed on time expended to save \$30,000.</i></p> <p><i>The only call logged with Equinox for FY19 was a request in December 2018 for a system review and consulting on a plan to renumber many of the Evergreen indexes to avoid collisions with new indexes introduced in release 3.1. Steve Callander at Equinox was assigned the ticket and the Systems Manager worked with him to ensure that our plan to renumber indexes was sound. Steve also reviewed the version of Postgres and other system resources and ensured that everything was adequate for release 3.1 and the web client.</i></p>	<p>April 30, 2019</p>	<p>Systems Manager, in consultation with Executive Director</p>

<p>H. Develop and implement a process for creating a new five-year strategic plan (FY2020-FY2024), including selecting a consultant, in consultation with Executive Board.</p> <p><i>The Executive Board of NOBLE served as the long-range planning committee for this update of our Strategic Plan.</i></p> <p><i>In the winter, it was decided we would follow precedent and gather member library input at a large-group meeting using an outside facilitator. Three facilitators who had done similar work for other Mass. networks and local libraries were recommended by Executive Board for further consideration. Gregory Pronevitz was selected for his knowledge and experience in the Massachusetts library community. The report compiled by Greg Pronevitz is contained within the Needs Assessment portion of the plan.</i></p>	<p>May 31, 2019</p>	<p>Executive Director and Member Services Manager</p>
<p>I. Arrange a meeting of NOBLE librarians to gather input for the goals and objectives of the next Strategic Plan.</p> <p><i>The meeting, facilitated by Greg Pronevitz, was held on April 30 at NOBLE and attended by 50 library directors and key library staff members.</i></p>	<p>March 30, 2019</p>	<p>Management Team</p>
<p>J. Draft the FY2020-2024 Strategic Plan and present to Executive Board and Members Meeting.</p> <p><i>Based on input from the large-group meeting, NOBLE's management team developed a set of goals and long-range objectives that were presented to Executive Board, approved and recommended to the membership. The background information in the plan was written by the Executive Director.</i></p> <p><i>The complete strategic plan was unanimously approved at the NOBLE Executive Board meeting of May 29, 2019, and recommended to Membership. The plan was unanimously approved by Membership at our Annual Meeting on June 6, 2019.</i></p>	<p>June 30, 2019</p>	<p>Executive Director</p>
<p>K. Share NOBLE's List Maker coding with other Evergreen users by posting the code to Git which may generate community enhancements for NOBLE to implement. Demonstrate the software at the Evergreen International Conference.</p> <p><i>Posting of the List Maker code was not completed in FY19 but is under way now in FY20.</i></p>	<p>May 31, 2019</p>	<p>System Support Specialist and Systems Manager</p>

<p>L. Check for frequent spelling errors in bibliographic data via an automated script that will identify records with common misspellings and put them in a file for staff to correct.</p> <p><i>A perl script called spellmaster.pl was created in March 2019. It searches Evergreen using an API to perform a keyword search for commonly misspelled words. Record numbers are put into a system record bucket and emailed to NOBLE bibliographic staff. The script runs Monday through Friday at 7:00 a.m.</i></p>	<p>June 30, 2019</p>	<p>Systems Manager and Member Services Manager</p>
<p>M. Investigate and implement more flexible methods for managing access to electronic resources, providing libraries with more control over which electronic resources are included in their library's scopes.</p> <p><i>Evergreen development would be needed to achieve this objective, which is not in the pipeline at this point.</i></p>	<p>June 30, 2019</p>	<p>Member Services Manager and System Manager</p>
<p>N. Complete implementation of new location for NOBLE offices, increasing long-term security of location while reducing ongoing costs and improving efficiency of layout for staff and systems.</p> <p><i>NOBLE moved into our new location on May 31, 2018. The move saved us \$24,000 in FY19, with projected continuing increases of over \$13,000 in rent alone. Utility costs are also reduced in the new location, saving \$2,500 in FY19 compared to FY18. The renovations and move were done at no cost to NOBLE. The early months of FY19 included implementation of new furnishings, fine tuning of meeting room presentation equipment by the vendor and the relocation of our generator.</i></p>	<p>December 31, 2018</p>	<p>NOBLE Staff</p>

Goal 7. Advocate for members

Advocate for and with member libraries to achieve mutual goals and shared objectives. Work with vendors, user groups, MassLNC and the open source community to further NOBLE goals and explore business opportunities and models. Continue working with the networks, the Mass. Library System, the Mass. Board of Library Commissioners, library associations, news media and members to advance the future of libraries in our area.

Actions	Timeframe for Activity	By Whom (optional)
<p>A. Work with MassLNC and the Evergreen community to specify software improvements, to be funded by MassLNC and NOBLE, based on needs reported by member libraries and NOBLE roadmap.</p> <p><i>Member Services Manager Elizabeth Thomsen represented NOBLE on the MassLNC development committee, along with Jeff Klapes, Erica Street and Christine Morrissey. Together they review, suggest and vote on software improvements funded by the development initiative.</i></p> <p><i>NOBLE funded an add-on to the MassLNC hopeless holds development to better match NOBLE needs and practice.</i></p>	June 30, 2019	Member Services Manager and NOBLE Evergreen Staff
<p>B. Present to local civic groups on the new and improved services provided by NOBLE and our libraries.</p> <p><i>No progress was made on this objective.</i></p>	June 30, 2019	Executive Director, Member Services Manager
<p>C. Work with the Evergreen community to expand the number of libraries using Evergreen in order to increase the support and development pool to improve the software through ongoing outreach efforts such as press releases, social media and representation at conferences.</p> <p><i>Member Services Manager Elizabeth Thomsen moderated the open source program at the American Library Association Annual Conference in Washington, D.C.</i></p> <p><i>Executive Director Ron Gagnon is writing press releases for the Evergreen community, including on the new releases, conferences and contributors of the month.</i></p> <p><i>Ron Gagnon was the unseen interviewer in the “I Am Evergreen” videos from the April Evergreen conference posted on YouTube.</i></p> <p><i>Ron Gagnon, Elizabeth Thomsen and Martha Driscoll</i></p>	June 30, 2019	Executive Director, Member Services Manager

<p><i>attended the 2019 Evergreen conference in Valley Forge, Pa.</i></p>		
<p>D. Work with MassLNC to expand the number of libraries participating in MassLNC in order to increase the support and development pool to improve the software through ongoing outreach efforts.</p> <p><i>MassLNC experienced significant changes this year with the departure of our long-time project coordinator in November. A part-time consultant was hired to keep the projects going for the remainder of FY19. After discussions with the community, it made sense to pass the development initiative project to Evergreen Indiana and transfer the remaining development initiative funding and projects under way to Evergreen Indiana and disband MassLNC.</i></p> <p><i>NOBLE continues to be an active participant in the new Evergreen Community Development Initiative, continuing with four representatives to the project. The new home allows NOBLE to reduce our ongoing costs while increasing the amount of our funds dedicated to development.</i></p>	<p>June 30, 2019</p>	<p>Executive Director, Member Services Manager</p>
<p>E. Participate in statewide, regional and national digital library projects, including the Digital Commonwealth and the Digital Public Library of America to promote the interests and collections of NOBLE libraries.</p> <p><i>NOBLE continues to be an active participant in the Digital Commonwealth. Our NOBLE Digital Heritage collections continue to be harvested into the Digital Commonwealth and the Digital Public Library of America. Participating NOBLE libraries continue to their Digital Heritage collections.</i></p> <p><i>Digital and Catalog Librarian Beth Willis participated in the Digital Commonwealth annual meeting in April.</i></p>	<p>June 30, 2019</p>	<p>Member Services Manager, Digital and Catalog Librarian</p>
<p>F. Seek out and represent NOBLE to potential member libraries to enhance the cooperation and resource sharing potential of NOBLE.</p> <p><i>No progress was made on this objective.</i></p>	<p>June 30, 2019</p>	<p>Executive Director</p>
<p>G. Participate in efforts to assure that area legislators are aware of impacts of changes in state funding on library services.</p> <p><i>NOBLE's Executive Director and Member Services Manager attended the NOBLE-area Legislative Breakfast sponsored by the Reading Public Library in February.</i></p> <p><i>The Executive Director also participated in MLA's Legislative</i></p>	<p>June 30, 2019</p>	<p>Executive Board and Executive Director</p>

<p><i>Day at the State House in March and met with aides to Rep. Speliotis and Sen. Lovely. The Member Services Manager participated and met with Speaker of the House DeLeo with Winthrop director Diane Wallace.</i></p>		
<p>H. Work with other Mass. library networks to develop a model and process for sharing of MARC records and other cooperative cataloging services.</p> <p><i>Discussion with other Mass. library networks' bibliographic supervisors was not fruitful, as they were not interested in such a project.</i></p>	<p>March 30, 2019</p>	<p>Member Services Manager</p>