North Of Boston Library Exchange, Inc. (NOBLE) FY2020 Action Plan Report Ronald A. Gagnon, Executive Director, Gagnon@noblenet.org	FY2020

The COVID-19 pandemic upended many plans for the last third of the fiscal year. NOBLE staff shifted to work not foreseen or specified in this document: adjusting Evergreen for shuttered libraries by extending due dates and other settings, providing authentication for new and extended use of electronic resources and supporting many new OverDrive Advantage implementations. After helping libraries wind down operations in March, we helped libraries pivot in the spring to different models, the start of summer focused on restablishing services in a different way, particularly curbside services. In between, NOBLE staff helping libraries with weeding projects, reconfiguration of collections, changes in local technology and facilitiating discussions among directors and library staff.

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)
A. Conduct at least six roundtable meetings. *9/18: Tech Services Roundtable* *9/26: Circulation Roundtable* *10/1: WordPress Roundtable* *10/29: Social Media and Marketing Roundtable* *11/5: Reference Roundtable* *11/20:Readers Advisory Roundtable* *2/25: Academic Circ Roundtable* *5/21: Tech Services Roundtable* *There were also eight Directors Roundtables, 2 of which were designated as academic and 1 for public*	June 30, 2020	Member Services Manager
B. Offer two half-days of onsite training/consulting to each member library. *Eighteen NOBLE libraries were provided training or consulting in 52 sessions in FY20 – Beverly, Endicott, Gloucester, Gordon, Lynnfield, Marblehead, MBLC, Merrimack, Peabody, Phillips, Reading, Salem, Salem State, Saugus, Stoneham, Swampscott, Wakefield and Winthrop. Topics included, OverDrive, course reserves, List Maker, local history and many other topics.*	June 30, 2020	Member Services Manager

C. Develop new online training materials for new functionality and services in Evergreen and other NOBLE services and revise existing for improvements. *Handouts were created for each of these 15 programs, with revisions between sessions as needed to refresh examples, add screenshots, etc.* ***Evergreen:*** *Understanding the Evergreen Catalog* *NoveList Select in the Evergreen Catalog* *Evergreen Cataloging Workflow* *Batches and Item Buckets* *Baskets, Record Buckets and Bookbags* *List Maker Overview* *List Maker Collection Management* *List Maker Shelf Sitter Reports for Weeding* ***NoveList:*** *Overview of NoveList Plus* *Searching for Diversity in NoveList Plus* ***G Suite:*** *Gmail Features* *Google Drive* *Google Shared Drive* *G Suite Sharing Options* *Tasks, Reminder and Keep* *Nineteen captioned training videos were also posted, to expand on some of the live sessions and to provide alternative access to the material.*	June 30, 2020	Member Services Manager
D. Develop and present training on Evergreen, Google apps and other topics to include both hands-on at NOBLE and remote online training options. *A total of 36 training sessions on these topics were presented: 25 on aspects of Evergreen (catalog, List Maker, buckets and cataloging), four on NoveList Plus and seven on G Suite, including three mail sessions, and drives and sharing.*	June 30, 2020	Member Services Manager with the Executive Director and Systems Manager
E. Hold a Tech Expo in the spring to highlight recent and forthcoming changes in library technology. *The Tech Expo was not held due to the pandemic.*	June 30, 2020	Management Team with NOBLE Staff

F. Develop and present two large-group presentations on new or updated services supported by NOBLE. *Large-group presentations included:* • *NOBLE Day at EBSCO, Ipswich, October 10, 48 participants* • *G Suite, February 5, 19 participants* • *Library Reopening, May 10, 100+ (via Zoom)*	May 31, 2020	Member Services Manager, Systems Manager and staff
G. Promote and conduct "Welcome to NOBLE" sessions for new key staff members at NOBLE libraries as requested. *Eight Welcome sessions were held, for eleven new staff members, all prior to March. Reminders of the option were sent to directors on August 28th and March 2nd.*	June 30, 2020	Management Team
H. Conduct an annual review of basic knowledge and NOBLE policies for heads of technical services, circulation supervisors and G Suite trainers identified annually by library directors. *Due to the pandemic closures, the annual review was deferred to FY21.*	June 30, 2020	Member Services Manager
I. Work with Member Services staff at CW MARS to develop at least one co-training program to be conducted in each network in lieu of MassLNC conference. *Investigation has revealed that though we operate the same systems set up similarly, the training models in use at the two networks differ – group in NOBLE vs. library-by-library in CW MARS – so as to make this more difficult and less valuable than originally conceived.*	May 31, 2020	Member Services Manager
J. Conduct an Awareness Session on security best practices, continuity and privacy. *The security best practices session was not held. The Executive Director proposed a Library Employee Confidentiality Agreement, which was discussed at the March Executive Board meeting and awaits further discussion and refinement. A reminder reading* "By using Evergreen you agree to keep the identity of patrons and the material they borrow confidential," *was added to key Evergreen web staff client pages to reinforce awareness among all users.*	May 31, 2020	Management Team

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)
A. Investigate options for Booking functionality in Evergreen, Google or local development to meet member library needs. *Even with the Booking Module refresh in release 3.4, Evergreen booking lacks patron-facing functionality that would allow patrons to book materials and manage their own bookings. Because of this deficiency, libraries have utilized third-party programs such as Assabet and LibraryInsight to book museum passes and other resources. Gordon College is still using an outdated and unsupported room booking program from Ball State University called OpenRoom because it continues to meet their needs. Some tweaks have been done to it to allow it to continue to work on newer versions of Perl and PHP.*	March 31, 2020	Member Services Manager, Systems Manager and respective staff
B. Update a roadmap for NOBLE priorities in Evergreen development, in consultation with working groups and roundtables. *Deferred to FY21.*	June 30, 2020	Management Team
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. *Through favorable Comcast pricing, we were able to upgrade all of our public sites to 100 mbps download Internet service in October, 2019. This level of service meets the standards of ALA for all sites except Lynn, Peabody and Revere which due to their 50,000+ population have a higher recommended bandwidth of 1,000 mbps.*	June 30, 2020	Executive Director
D. Investigate and test methods to streamline patron batch loading. *NOBLE staff have streamlined as much as possible the loading of patron records from member academic*	June 30, 2020	NOBLE Evergreen Team

institutions, short of acquiring development money and partners to create a patron loading interface in Evergreen,. A secure upload interface created by Systems Support Specialist Suzanne Paterno in 2018 continues to allow libraries to securely transfer a file to NOBLE via a web page uploader. In addition, Bunker HIll, Gordon, and Salem State IT staff have developed scripts that periodically transfer files to NOBLE via secure file transfer.		
E. Investigate and test methods to streamline batch loading of MARC bibliographic records. *After meeting with Database Support Analyst Christine Morgan we experimented with loading larger files of records while monitoring system load. Loading larger files did not result in a slow-down. Previously large loads were broken into smaller files and monitored. In June of 2020 Michele Morgan implemented Evergreen lp#1482757 which is a fix she wrote to prevent Evergreen from deleting and recreating call numbers when marc records with 856 links for electronic resources are loaded. This call number "churn" causes unnecessary system drag and slows down the loading process. The fix has not been committed to core Evergreen but Michele installed it on the production system. The time to load files was decreased somewhat.*	June 30, 2020	NOBLE Evergreen Team
F. Test and provide input on the first stages of "Did You Mean" functionality being developed for MassLNC. *Progress on this development was slower than expected. Availability for testing delayed until October, 2020.*	April 30, 2020	Member Services Manager with Evergreen Team
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. ***Sep 9-13 2019 Bug Squashing*** *NOBLE participants included:* *Christine Morgan, 1 new bug reported* *Michele Morgan, 1 new bug reported, 7 comments on bugs, 1 patch submitted, 1 patch updated, 1 patch signoff* ***Feb 17-21, 2020 Feedback Fest*** *NOBLE participants included:* *Martha Driscoll, 1 feedback, 1 signoff, 1 patch submitted* *Michele Morgan, 4 feedback, 2 signoffs, 1 patch submitted* ***March 16-20, 2020 Bug Squashing*** *No participation. Bug squashing did not happen due to pandemic shutdowns.*	June 30, 2020	NOBLE Evergreen Team

June 9-11 Evergreen 2020 Online Conference *Programs were presented by Michele Morgan, If This Then That: Action Triggers Are More Than Just Notices and Elizabeth Thomsen, Batches, Baskets, Buckets and Bookbags*		
H. Seek and examine alternatives to improve course reserves functionality and seek better integration with Evergreen. *NOBLE agreed to contribute to an LSTA-funded project to create a course materials module in Evergreen spearheaded by Treasure Valley Community College and Linn-Benton Community College in Oregon in January. The NOBLE contribution provided additional electronic resource capability. Testing began in August, 2020, and the development is included in Release 3.6 which was released on October, 2020. NOBLE implementation is planned for January, 2021.*	June 30, 2020	NOBLE Evergreen staff
I. Advocate with vendors for beneficial pricing for member libraries for a variety of services of interest to our libraries through group purchase contracts. *We continue to provide excellent pricing on a menu of items used by our libraries, including EBSCO databases, Envisionware PC management and printing software, Wowbrary new item notification services and hardware from Dell (below state contract pricing) and barcode readers and receipt printers. A new model scanner was introduced that can read barcodes from smartphone screens and can read and download name and address data from drivers licenses.*	June 30, 2020	Executive Director and Administrative Assistant
J. Participate in efforts to develop and further refine relevance metrics in the catalog, including activity metrics. *A roadmap was created in February 2019 to tackle this complex problem. The way Evergreen determines relevance changed with release 3.1 resulting in popularity metrics having almost no effect on search results. The dev2 test system was loaded with a copy of the production database with the intent to examine to the following system settings:* • *coverage density settings* • *new blob indexes (author, title, subject)* • *adjustments to virtual index* • *adjustments to relevance settings* • *combined search (not currently used in production)* • *stemming*	June 30, 2020	Member Services Manager with NOBLE Evergreen Staff

• *synonym list* *These action items were defined but no progress has been made:* • *Compile example searches that illustrate the problem* • *Test variations in the above system settings* • *Submit a Launchpad bug* • *Discuss this issue and test results with CW/MARS* *Roadmap Document:* *https://docs.google.com/document/d/1ef-7-ypafWukXYn1aF8JeaBH-RWEKcAEiOHXZEsDG3Q/edit?usp=sharing*		
K. Create a framework for customization and branding of member libraries' catalog pages for local header links to dynamic lists (such as new titles and top holds), logos and colors. *Guidelines for customization of member libraries' catalog pages were developed and eleven libraries availed themselves of the ability – Beverly, Danvers, Gordon, Melrose, Merrimack, Peabody, Reading, Saugus, Stoneham, Swampscott and Wakefield. Among the customizations were links to new items, including content carousels and links to pandemic changes in service.*	June 30, 2020	NOBLE Evergreen Staff

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)
A. Combine and integrate existing NOBLE policies into a more cohesive policy manual and propose language to fill gaps and resolve discrepancies, consulting with working groups as appropriate. *Work continues on policies to make them more cohesive in preparation for combining into a policy manual. An example is the work on the records retention policies passed in passed in June, 2020 following recommendations from the Resource Sharing Working Group and Executive Board.*	May 31, 2020	Executive Director, Member Services Manager and Systems Manager with Executive Board
B. Work with member libraries to create "How to get a library card" documentation in line with MBLC requirements for NOBLE and library websites. *"How to get a library card" documentation was posted on NOBLE's public website in August, 2019, after discussion with Executive Board and NOBLE staff. It was made available to member libraries for posting on their websites.*	April 30, 2020	Management Team and Resource Sharing Working Group

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)
A. Update roadmap of development priorities for the Statistics Dashboard. *A roadmap of development priorities for the Statistics Dashboard is maintained by Systems Support Specialist Suzanne Paterno.*	May 31, 2020	Systems Manager, Member Services Manager and Systems Support Specialist
B. Further develop 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. *Catalog usage statistics were added to the Dashboard in May 2020 using a custom script that searches the Evergreen log files for searches by type (author, title, keyword), format (book, magazine, video), and searches limited to specific libraries or location groups (childrens, teens, adults).*	May 31, 2020	Systems Manager, Member Services Manager and Systems Support Specialist
C. Enhance Digital Heritage usage statistics in the Statistics Dashboard. *Digital Heritage search statistics were added to the Dashboard in May 2020 using a custom script that uses the web log files to count site, collection, exhibit, item, and search statistics for each participating library*	June 30, 2020	Systems Manager, Member Services Manager and Systems Support Specialist
D. Work with member libraries seeking to implement software to manage electronic resources and compile and analyze usage. *Progress was not made this year. Merrimack College contracted with RedLink through NOBLE's consortium pricing, but the service ceased operations a few months later. Preliminary discussion was held with EBSCO, but their current product did not meet our needs.*	June 30, 2020	Management Team
E. Meet with academic library members to determine needs for additional statistics. *We met with one library prior to the pandemic, without any significant need identified. We will make another attempt in the second half of FY21 after implementing Release 3.6.*	June 30, 2020	Systems Manager, Member Services Manager and Systems Support Specialist

F. Determine the need for acquisitions data in the Statistics Dashboard. *Acquisitions data presents an additional privacy/security challenge compared to other statistical data and after NOBLE staff discussions this was deferred until greater Staff Information System login security can be provided.*	June 30, 2020	Member Services Manager, Systems Manager, and Systems Support Specialist
G. Provide and improve secure access to the NOBLE Staff Information System. *A first attempt to secure access to the Staff Information System utilized an ezproxy instance to permit access to staff members with Evergreen logins. Ezproxy is able via the SIP2 protocol to query Evergreen user database, but access could only be limited by patron type and not by more granular permissions. Systems Support Specialist Suzanne Paterno developed a script called Authenticate.php that queries the postgres database and verifies that the user entered the correct password and the user has permissions to access the Staff Information System. This was going to be tested in a WordPress to see if it would work in the header of the Staff Information System WordPress but was delayed so as to not unduly hamper access working from home during pandemic closures.*	April 30, 2020	Systems Manager and Staff

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)
A. Continue work with interested libraries seeking better integration with academic authentication sources to streamline use of electronic resources. *System Manager Martha Driscoll worked with Gordon College IT staff to transition authentication for electronic resources from their Blackboard plugin to the campus LDAP directory. After establishing connectivity and testing, the Jenks Library staff provided a login screen mock-up for the ezproxy login screen. The ezproxy was switched from Blackboard authentication to LDAP authentication on May 28, 2020.*	March 31, 2020	Systems Manager
B. Evaluate impact of OverDrive Reciprocal Lending Agreement with other Mass. networks on OverDrive usage and work with Executive Board to make a budget recommendation for FY2020. *NOBLE's participation in the OverDrive RLA has had a positive effect for our users, vastly expanding the universe of titles available to them to just under one million as opposed to NOBLE's collection of 27,746. NOBLE cardholders have benefitted from the opportunity, borrowing 72,247 items from other Mass. networks while NOBLE loaned 58,433 items to other libraries across the state.*	September 30, 2019	Executive Director and Member Services Manager
C. Evaluate efficacy of first year of OverDrive Magazines collection; report to membership and factor into FY2021 NOBLE OverDrive budget. *FY19 OverDrive magazine circulation was 9,813 (September through June, so annualized would have been 13,084) while FY20 circulation was 16,683, an annualized increase of 27.5%. Cost per circ. is twice that of our other OverDrive materials, but still economical.*	September 30, 2019	Executive Director and Member Services Manager with ERDWG
D. Work with member libraries to grow and promote the NOBLE Digital Heritage collection. *Participating libraries added 67 new items in FY2020. We have not had any new libraries join the project in the past year. Digital and Catalog Librarian Beth Willis met with three*	June 30, 2020	Member Services Manager and Digital and Catalog Librarian

participating libraries to work on new collections and for training – five meeting/training sessions were held, two in-person and three online. Three libraries are working on pandemic-related projects, none are yet public. *For the seventh year we once again promoted the collection and project through the NOBLE holiday card, featuring a photo from the collection of the Lynn Public Library of the A.E. Little house in Lynn after a snowstorm.*		

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)
A. Maintain currency of Evergreen software by loading and implementing new features in Release 3.2. *Release 3.2.8 was loaded on August 25, 2019. The release brought the capabilities for autorenewal, patron preferred names, improvements to loading bibliographic record files and a streamlined emergency closing process.*	January 30, 2020	Member Services Manager, Systems Manager and Executive Director
B. Investigate, load and implement new features in Evergreen Release 3.3. *Release 3.3.5 was installed on January 8, 2020. The release brought the ability to allow others to use your account on your behalf and MARC Import/Export (AKA Vandelay) interface improvements.* *Upgraded Postgresql database from version 9.4 to 9.6 on June 28, 2020 in anticipation of release 3.4*	June 30, 2020	Systems Manager, Member Services Manager and Executive Director
C. Investigate and test cloud-hosting of Evergreen servers and compare against other hosted options and local hosting. *Objective delayed.*	February 28, 2020	Systems Manager and staff
D. Investigate and test cloud-hosting of websites and other services to reduce costs and improve reliability. *Objective delayed.*	March 30, 2020	Member Services Manager and Systems Manager
E. Investigate and implement more flexible methods for managing catalog access to electronic resources, providing libraries with more control over which electronic resources are included in their library's scopes. *The issue was brought to a meeting of the Electronic Resources and Database Working Group for input and guidance but there was no agreement or clear consensus for change.*	June 30, 2020	Member Services Manager and System Manager

We did implement a "Exclude Electronic Resources" checkbox and dropdown entry in the catalog to match the "Limit to Electronic Resource Resources" limiter already in place.		
F. Complete cleanup of 16,000 record catalog backlog and detail results. *Between November 2019 and January 2020 NOBLE sent a total of 13,074 bibliographic records to Backstage Library Works for upgrading. These records were selected from our backlog of temp records, which numbered approximately 16,000. Backstage was able to upgrade 11,330 of these records to a standard meeting our requirements for complete records. This represents a match rate of 86.7%. The total cost of the project was $43,376.40*	June 30, 2020	Member Services Manager and Staff

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)
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. *MassLNC transferred the Evergreen development project to Evergreen Indiana's Evergreen Community Development Initiatie (ECDI) in July, 2019. NOBLE continues to be a member, but at a much lower cost and with more funds going to development. NOBLE also worked with Treasure Valley Community College and Linn-Benton Community College, both in Oregon, contributing to their new Evergreen course materials module.*	June 30, 2020	Member Services Manager and NOBLE Evergreen Staff
B. Present to local civic groups on the new and improved services provided by NOBLE and our libraries. *Executive Director Ron Gagnon was interviewed on radio, North Shore FM 104.9, WBOQ, on May 5th by State Senate Minority Leader Bruce Tarr.* *A message was sent to NOBLE directors on February 4th offering our availability to speak to groups on ebooks, eresources and other library trends.*	June 30, 2020	Executive Director, Member Services Manager
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. *Executive Director Ron Gagnon is a member of Evergreen's Outreach Committee. Principal duties in FY20 were writing press releases and participating in the planning of the Evergreen 2020 Online Conference.*	June 30, 2020	Executive Director, Member Services Manager

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. *MassLNC ceased operations at the end of the prior fiscal year.*	June 30, 2020	Executive Director, Member Services Manager
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. *NOBLE continues to participate in these wider digital library projects, our NOBLE Digital Heritage collection is harvested by the Digital Commonwealth and the state collection is included in the DPLA. NOBLE staff also participate in the Digital Commonwealth annual meeting.*	June 30, 2020	Member Services Manager, Digital and Catalog Librarian
F. Seek out and represent NOBLE to potential member libraries to enhance the cooperation and resource sharing potential of NOBLE. *Research was done to identify private schools in our area with libraries as potential members, but the project was put on hold due to the pandemic.*	June 30, 2020	Executive Director
G. Participate in efforts to assure that area legislators are aware of impacts of changes in state funding on library services. *Executive Director Ron Gagnon participated in the local legislative breakfast held at the Peabody Institute Library of Danvers on February 28th and in the Virtual MLA Legislative Day on May 14th. In addition, Gagnon participated in a radio interview with State Senate Minority Leader Bruce Tarr on North Shore FM 104.9 WBOQ on May 5th.*	June 30, 2020	Executive Board and Executive Director
H. Work with other Mass. library networks and others to develop a model and process for sharing of MARC records and other cooperative cataloging services. *Despite repeated attempts, only one network was willing to share their Z39.50 target, and we are also able to indirectly share cataloging with another through SkyRiver. OCLC-using networks have a lesser need for sharing since they share through OCLC already. No further progress on this concept is likely.*	March 30, 2020	Member Services Manager

I. Work with CW MARS and MassLNC Development Initiative Partners to complete transition to revamped MassLNC in light of staffing reduction to part-time to best maintain a robust development pool to further Evergreen development. *The Development Initiative was transferred to Evergreen Indiana at the end of FY19. NOBLE continues to be an active member. Executive Director Ron Gagnon was MassLNC treasurer during its wind-down year.*	June 30, 2020	Executive Director