# Strategic Plan FY2015-2019

**June, 2013**

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# Mission Statement:

NOBLE: The technology partner for libraries north of Boston.

# Vision

Looking out five years, members see NOBLE as a "hub", providing continuity of expertise and services, a "gateway for human and technology resource sharing".

Customer service, both in-person and virtual, the changing needs of users and staying ahead of technological advances were all high priorities of our librarians in which they see NOBLE to be a valued partner.

Member librarians participating in our needs assessment meeting noted that NOBLE should provide "technology innovation" and should "implement technology faster". The escalating pace of technology requires ongoing training, both provided by NOBLE and shared among members, with NOBLE both providing and facilitating the sharing of knowledge. However, participating librarians have also identified non-technology training from NOBLE as needed.

"Continue and improve customer service", "continuity of service" and "streamline and simplify access to services" were a theme of the role that NOBLE should play in helping our libraries to achieve their vision of the future. Librarians in NOBLE also see review of policies as a priority, to allow new mobile services and to break down barriers to service. "

Overall, participating librarians seemed pleased with their partnership with NOBLE and look forward to continuing and enhancing the partnership in the future.

# Values

Participation in NOBLE by libraries is driven by a set of values that members expect will remain important in the future.  These include:

- Keeping libraries an important and welcoming part of their communities.

- Excellent customer service, proactive staff, anticipating user needs

- Innovation, experimentation, exploration

- Collaboration within NOBLE

- Using technology to improve service and increase efficiency

- Having a strong "cyber presence", facilitating between the digital and print world

# Background Information

The North Of Boston Library Exchange, Inc. (NOBLE), directly serves twenty-eight member library organizations in the northern suburbs and Boston proper. Twenty-six full members (17 public libraries, 8 college libraries and one private academy) one associate academic member and one special library associate member serve constituencies through 36 connected locations.

NOBLE libraries range in size of holdings from nearly a million items to 12,000. Public libraries range in size from 52,590 to 184,276 volumes, while college libraries range from 12,105 volumes to 927,579 volumes.

A population of 564,052 residents and 55,023 students are served by NOBLE's member libraries through locations in 24 communities. Communities served by NOBLE libraries range from mid-sized cities through mid-sized towns, with the exception of a special library and college library in Boston. Of the academic libraries, five are part of the state higher education system (four community colleges and one state university), four are private, four-year institutions and one is a private secondary academy. With the exception of a small art college, the member colleges offer a full range of programs.

Services provided to full member and associate member libraries are a complete automated circulation system, an online web catalog, access to over 4,000 full-text periodicals online through EBSCO, access to a shared OverDrive ebook and audiobook collection with just under 10,000 holdings, Internet services including a NOBLE web page and guide to resources, electronic mail, acquisitions software, serials management software, collection analysis and reports, access to the statewide virtual catalog, technical training and consulting and a Digital Heritage site supporting local online resources. Ongoing support of NOBLE software, central site hardware and the NOBLE telecommunications system is provided. NOBLE also provides outreach to library users through Facebook and other social networking opportunities and provides the NoveList NextReads service newsletters with 26 regular email newsletters highlighting best sellers, and various genres of fiction and nonfiction, young readers lists and audio and ebooks.

NOBLE operates an Evergreen open source library management system and participates with two other networks in the Massachusetts Library Network Cooperative (MassLNC) to support and foster the Evergreen system. NOBLE headquarters and public libraries are connected via Comcast Internet services using telecommunications hardware, configuration and 24x7 monitoring by Atrion Networking Corporation. Academic and special library members connect through their institutional Internet service.

Additional optional services include website hosting, onsite PC support, and group purchases of PCs and peripherals and Envisionware PC management systems.

The academic, public and special libraries of the North Of Boston Library Exchange, Inc., share unified bylaws, governing bodies, committees and network staff. The Meeting of the Members of the Corporation is comprised of the directors of the member libraries or their designee, each full member with one vote. The Members Meeting authorizes the annual budget and schedule of fees, establishes priorities for the network, approves policies and elects officers. Principal officers are President, Vice-President/President-Elect, Treasurer and Clerk.

Officers and at-large members constitute the Executive Board. The Executive Director is a non-voting member of the Executive Board. The Executive Board is responsible for administrative, budget and managerial matters, planning issues and personnel matters relating to NOBLE employees.

Network staff includes an Executive Director, a Member Services Manager, a Systems Manager, Catalog and Digital Librarian, Systems Support Specialist, PC Support Specialist, Technical Assistant, Database Assistant and Administrative Assistant. Staff is supplemented with part-time database and technical personnel.

All members share in network expenses for personnel, telecommunications, computer and software maintenance, database management , headquarters offices and professional and administrative support services. Each local library is responsible for acquiring and maintaining local PCs and peripherals, and entering short bibliographic and item data. NOBLE library patrons are reciprocally served at all libraries, in accordance with state regulations. All NOBLE libraries are open to the public, and participate in interlibrary loan.

Just under a million items were shared by NOBLE libraries in the past year alone, an increase of 35% over the last decade. Sharing is accomplished both by patron-direct "walk-in" interlibrary loan, aka reciprocal borrowing, as well as traditional interlibrary loan. NOBLE was established to provide expanded resource sharing and has succeeded in a very significant way.

NOBLE has a proven record and a demonstrated commitment to keep pace with technological changes to improve service to library users.

# History

NOBLE libraries, 26 full members and two associate members, can boast of a full MARC database with authority control, centralized cataloging, a powerful online web catalog, online full-text information, Internet access and a state-of-the-art integrated library system, a tremendous advance since the project was begun three decades ago by five innovative neighboring libraries.

In 1980, the consortium of five public libraries (Beverly, Danvers, Lynnfield, Peabody and Wakefield) proposed to share a circulation system with short author/title records to foster resource sharing. The participating libraries purchased their own terminals, leased telecommunications lines and directed their own data entry operations, with the central computer upgrade funded with $108,800 in LSCA funds. Host site Peabody had begun using the system for daily circulation in February, 1980, and by August, 1981, Lynnfield became the first remote library to go online.

In 1982, the Board of Library Commissioners approved funding ($108,900) for a second upgrade of the central site hardware at Peabody to enable the public libraries in Lynn, Marblehead, Reading and Swampscott, and North Shore Community College in Beverly and Lynn, to participate in the existing resource sharing effort. The group now became known as the North Of Boston Library Exchange, or NOBLE. As with the original members, each of the five new members provided for the purchase and installation of local equipment.

Based on its experience, North Shore Community College and five neighboring libraries sought to start their own cluster of academic and special libraries. Application was made to the Board of Library Commissioners, and award was made (LSCA, $165,000) in August, 1983. The award carried the stipulation that these libraries, too, were to become members of NOBLE. Thus NOBLE's ranks were further swelled by the addition of Endicott College and Montserrat School of Visual Art (now Montserrat College of Art) in Beverly, Salem State College in Salem, Gordon College in Wenham, and the special technical library of Varian Associates in Beverly. The academic and special central site was established at the North Shore Community College campus in Beverly. In 1988, disk storage on the academic system, and internal memory on both NOBLE systems was upgraded through a state grant of $165,611.

In 1984, the public libraries of Melrose, Gloucester and Stoneham joined the public library database, and in 1986, through a $153,500 LSCA grant, the public libraries of Everett, Salem, Saugus and Winthrop joined the network. The library of the Massachusetts Board of Library Commissioners in Boston was added to the Public database. In July of 1992, two additional college libraries became members: Bunker Hill Community College in Charlestown and Middlesex Community College in Bedford and Lowell. In July, 1993, Revere joined NOBLE's public libraries.

As the network grew, a more defined organizational structure was essential. North Of Boston Library Exchange was incorporated as non-profit in 1985, with

Federal 501(c)3 status granted by the IRS in 1986. In May, 1985, October, 1988, June, 1996, May, 2006 and June, 2007, NOBLE's bylaws were revised to reflect the dynamic challenges of successfully operating a multi-type resource sharing network, and were ratified unanimously.

In 1986, a project was begun to convert existing incomplete bibliographic records to full MARC cataloging. Initial tape conversion by Utlas was funded through a tri-network (Minuteman, MVLC and NOBLE) grant totaling $200,000. Bibliographic database and authority control maintenance and record enhancement continues within the centralized cataloging operation.

The network's telecommunication system was integrated through a $230,000 state MBLC grant received in FY 1988. Direct searching of either NOBLE database from any staff terminal was implemented in the summer of 1988 to facilitate resource sharing. The upgrade also provided greater capacity, more reliable service and reduced costs. A FY'92 LSCA Title III grant of $114,417 to increase the capacity of the telecommunications system through the installation of digital lines was completed to control costs and improve service.

In December 1989, NOBLE's two central sites were consolidated to one at North Shore Community College in Beverly, providing more efficient use of personnel and computer equipment to improve service and contain costs. The move coincided with the installation of a grant-funded (state $391,767, LSCA $86,366) Sequent computer system from CLSI for public libraries to better serve the needs of NOBLE users for user-friendly direct access software, system reliability and increased access capacity. The academic system was similarly upgraded from archaic Digital PDP processors through a $286,530 LSCA grant in August, 1990, to expand direct user access and extend NOBLE services to unserved academic populations. Middlesex Community College and Bunker Hill Community College became NOBLE's newest members.

In the spring of 1993, NOBLE became the first Massachusetts cluster on the Internet, through funding and support from the Mass. Board of Library Commissioners.

NOBLE moved to new, independent headquarters in June, 1994, located in leased space in Cherry Hill Corporate Center in Danvers. The facilities include a training room, conference room and meeting room in addition to a proper computer room, work area and offices. Over 30 sites were reviewed before deciding on the Cherry Hill space. The move was necessitated by the impending move of former host site North Shore Community College to close its Beverly campus, space limitations, and the need for a permanent site to install a new generation of equipment. The Cherry Hill lease was renewed in 1999, 2005 and 2010, running through May, 2016.

New Geac Sequent systems were installed in June, 1994, to serve the public and college members of NOBLE. The systems were funded in part through LSCA grant funds, $416,552. New Plus software from Geac was installed with the new systems.

Improved e-mail software and an Internet Gopher were also brought up on the new systems, both open source software.

A separate Web server was implemented in February 1997 to host NOBLE's Web pages, Staff Information System and the Web sites of member libraries for a small fee. A separate mail server was installed in December 1998. Both servers were replaced with larger and more powerful equipment in December 2000 and utilize open source software.

Our search for a new central system begin in 1998 when it was learned that a considerable investment would be required to bring our existing Geac Plus systems to Year 2000 compatibility, coupled with a significant and problematic decline in the quality of the software provided by Geac.

Feeling that software had advanced sufficiently to accommodate both our college and public libraries on a single system, a prime objective was to finally merge all our libraries onto a single new integrated system. The objectives of the merger were to both facilitate cooperation between types of libraries and to contain costs.

System Selection Working Groups of a dozen member librarians representing all member library types and departments were convened in FY1998 and FY1999. Our LSTA grant application in FY1998 was not funded, but was funded the following year with State ($300,000) and Federal LSTA ($308,000) funds. Separate system searches were done each year to assess the evolving technology available. In the second search round we were also required to by the Statewide Advisory Council on Libraries to consider only client-server systems with PC workstations in place of terminals. In both searches, the Innovative Interfaces system was chosen as the best for our situation and with the strongest track record of customer support.

The new Millennium system from Innovative was brought live on December 20, 1999, six months after contract-signing, following an intensive training and data conversion schedule.

Three area college libraries were also facing Y2K and other issues with their systems: Bradford College in Haverhill, Merrimack College in North Andover and Northern Essex Community College in Haverhill and Lawrence. After examining alternatives, all three chose to join NOBLE, to be on our new system in January, 2000. The three additional new databases were merged with our existing two databases on time without any ongoing problems. Unfortunately, Bradford College closed in May, 2000.

Additional Millennium software modules were subsequently implemented, including serials in 2001 and acquisitions and imaging in 2002 and Patron API for authentication in 2006.

Phillips Academy in Andover applied for membership in 2003 and became a full member on January 1, 2004.

The equipment supporting our wide area telecommunications network was upgraded in two phases for reliability, security and throughput issues. The first in FY2004 upgraded NOBLE LAN equipment in libraries for greater security by replacing hubs with switches and routers programmed with virtual LANs (VLANs) to segregate staff and patron traffic. This work was funded by $42,400 in LSTA funds plus $21,187 in state funds. The second phase in FY2005 (LSTA $61,703) upgraded central site equipment with a new central router capable of handling the increased bandwidth of a T3 connection to our libraries, a gigabit switch to improve throughput among our servers and the new router and a new firewall to improve security and wireless security devices for libraries that had already implemented wireless access on the NOBLE network. Our Internet capacity was also upgraded from 3 Mbps to 10 Mbps at that time.

We also secured a PacketShaper through a Gates Foundation grant of $12,000 from the Mass. Board of Library Commissioners in 2005 to help manage our network by prioritizing traffic to our Millennium system.

Our telecommunications equipment was again upgraded in the spring of 2011 through a $40,958 LSTA grant from the MBLC in conjunction with our switch from a private dedicated data network to public Comcast business class Internet connections to reduce costs and provide more bandwidth. Public library routers were replaced for reliability and to upgrade to models that provided encryption to protect information being sent over the Internet. Academic library members were provided with encryption clients for use on their institutional Internet connections. At NOBLE the firewall was replaced and a new gigabit switch installed. NOBLE's connection was upgraded to a 20 mbps Comcast Metro Ethernet connection.

Our Innovative servers were replaced in January, 2006. New Sun servers for our main and training systems replaced our original 1999 DEC/Compaq Alpha servers which were not compatible with upcoming Innovative software releases. The replacement was subsidized by a $42,043 LSTA grant.

Also through a FY2006 LSTA Open grant, we received $35,000 to be the first network in the state to implement federated searching. NOBLE's Super Search, powered by Serials Solutions' Central Search, enabled searching of NOBLE's EBSCO and the state-funded Gale databases in a single, deduplicated search.

In April, 2007, we implemented a new Dell server to house the NOBLE Digital Library and replace our aging web and mail servers. The new server was made possible through a $9,000 grant from Danversbank.

In 2008, frustrations with the cost, slow pace of system development and bug fixes, the lack of functionality and interest in consortia issues, and concerns about the corporate stability of system vendors and systems along with a realization of the growing maturity of open source library systems led Massachusetts networks to consider trying something similar to the state of Georgia's open source library system project here. Three – C/W MARS, MVLC and NOBLE – pursued the project

Administrators from those networks met several times to sketch out a plan and submitted a successful grant proposal for $412,000 to the Mass. Board of Library Commissioners in March, 2009 to fund a project coordinator, migration and development needed for Massachusetts libraries.

The two contending open source systems, Koha and Evergreen, were downloaded and studied to determine which best met the complex needs of Massachusetts library consortia, particularly an examination of the underlying architecture of each system to determine which can best handle the complicated circulation and resource sharing needs of large organizations made of independent libraries.

Based on this review, a unanimous recommendation was made by the group to move forward with Evergreen, a recommendation that was adopted by the membership of each network in the fall of 2009.

Once the platform was selected, assessing user requirements and system development needs began. Based on the requirements document and our own system assessment, a list of development needs was generated. Working closely with staff from the three networks, the Project Coordinator reviewed the new system's options, parameters and data structure options and worked closely with network staff to devise a scheme that could be used by all three networks. The coordinator also serves as the point of contact between the MassLNC group and vendors that are part of the development or migration process. After training and test data migrations, the first network, MVLC, moved to Evergreen in late May, 2011. NOBLE and C/W MARS followed on May 29, 2012. NOBLE's Evergreen hardware costs were subsidized by an LSTA grant of $56,060 from the Board of Library Commissioners.

Evergreen provides the ability to control ongoing costs and steer development to directly meet the needs of our libraries offering greater financial, organizational and operational stability going forward, as we are no longer at the mercy of proprietary system vendors. While the new system should be able to meet more of our libraries' needs, we will also need to work more closely together than ever to provide seamless service to users across NOBLE and in concert with the other cooperating networks, and other Evergreen users.

We should, over time, have a better, more sustainable system that will allow us to work more effectively, cooperate more easily, and provide a greater range of services to our patrons at a lower cost. These were the goals that brought libraries together into automation and resource sharing networks like NOBLE three decades ago, and they can continue to guide us into a new era of automation and cooperation.

Through our unique structure, and the foresight and support of ourr libraries, we have achieved one of the few shared public/academic networks in the state. Academic and public librarians at every level share network governance, resources and knowledge. Our annual fee is competitive with other merged and single-type clusters in the area and provides great value to our members. The services and technology provided to our libraries is among the best in Massachusetts.

# Needs Assessment

*The primary, formal vehicle for gathering input for our strategic planning process was a meeting facilitated by Owen Shuman, principal of Owen Shuman Consulting. In addition to her consulting work, Owen has been active in many areas of librarianship: Director of the Groton Public Library, Library Information Specialist at Lotus Development and Assistant to the Director at the Mass. Board of Library Commissioners.*

*Following is the report and analysis of the meeting provided by Owen Shuman:*

## North of Boston Library Exchange (NOBLE)
## Report of Planning Session facilitated by Owen S. Shuman on April 3, 2013

Owen Shuman Consulting was engaged by NOBLE's Executive Director, Ron Gagnon to facilitate a planning session for the network's membership as part of the Long Range Planning process as required by the Massachusetts Board of Library Commissioners.

This planning session was held from 10:00 AM- 1:00 PM on April 3, 2013 at NOBLE's headquarters in Danvers. There were 63 attendees from member libraries representing academic, school, and public libraries. In addition, there were three members of NOBLE's Management Team who participated by observing and listening to the breakout sessions and the general meeting.  This planning session was designed to be the vehicle by which NOBLE staff will learn what the members want from their network today and in the next five years.

The format of the planning session included an introduction to the day with an explanation of the assignment of breaking into seven working groups for two separate sessions of thirty minutes each. Each session had questions for the groups to answer and report back to the full body.  In addition, the groups were required to prioritize their responses. Prior to the first session slides of innovative services in public, school and academic libraries (some of which were from libraries in the network) were shown to the members to inspire as well as encourage them to think creatively about future possibilities for their libraries. Following the presentation, they were asked to answer two questions in the first group session.

1. When your libraries are at their best today, what are they doing?

2. Your future library in 2019 is vibrant, vital and relevant. What is it doing and what does it look like?

After these questions were answered, the groups were asked to prioritize the top 3-5 services, ideas, goals for their libraries and to share them with the group. As each group reported their priorities, they were recorded and simultaneously projected on the screen at the front of the room.  The list included over 25 items with some duplication. During the break, similar responses were grouped together which reduced the list to seventeen. The need for libraries to focus on local initiatives had been mentioned in a group session but was not reported so it was added later.

**Responses** (top 3-5)

1. Library & Staff will be 'go to' place and a destination/community center

2. Proactive staff: Roaming - Meeting users where they are (physical and virtual)

3. Excellent customer service - Getting to Yes - Less hoops - Service oriented physical and virtual - Library will have something for everyone/users will drive decisions of library – library will anticipate user needs

4. Serve traditional users and digital users

5. Mobile: apps (create for libraries), access & check out

6. Touch technology in all areas of library use

7. Breaking down barriers to access (physical & virtual)/ streamlined access

8. Cyber presence - Link physical and digital – E-content / streamlined access - Facilitators for public into digital world - Dynamic websites

9. Innovation, experimentation, exploration

10. Improve assessment measures/access to data to show library value

11. Flexible and open space, reconfiguring space to meet user needs

12. Collaboration within NOBLE - Seamless service – results oriented – Partnerships

13. Staff and space  (physical and virtual) will be welcoming, accepting and integrate diverse users, ages and cultures - Welcoming and relevant to All

14. Visual, object oriented–not text

15. Defender and provider of free access

16. Using technology to free up staff time

17. Staff cross training at each library

18. Local – focus, content, programs, creations, awareness of local issues, be locally relevant

In the second session participants were asked to answer the question below and to then select the top three priorities. Again, there were similar themes around customer service and how to effectively provide quality service in virtually as well as in person.

Many of the comments focused on how best to meet the changing needs of the users, stay abreast and ideally ahead of technological advances and help each other be the best library possible.  The twenty responses are given below.

What role should NOBLE play in helping you reach your vision?

**Responses** (top 3)

1. Training for tech (not just Evergreen) and emerging tech

2. Work on Noble policies to allow mobile cards & other services

3. Leadership role in sharing e-resources

4. Training: also in non-tech areas / collaborating with MLS and other

5. Gateway for human and technology resource sharing / internal blog / collaboration / facilitation

6. New staff @Noble? (because you can't ask for more w/out supporting costs)

7. Data –assessment and evaluation / control – best practice

8. Policy to drive Noble not software

9. Noble as a hub

10. Seamless and customized access to catalog / integration

11. Technology Innovation

12. Implement technology faster

13. Statewide collaboration to deliver services

14. Continue and improve customer service- Continuity of service

15. Streamline and simplify access to services

16. Breaking down barriers to getting to Yes for users

17. Promote and advocate for e-content

18. Archiving and remote meeting for staff

19. Noble facilitate reviewing policies (network's & libraries do same internally)

20. Software that anticipates user need

**Establishing Goals**

Because twenty items are an unreasonable number of goals for a five year plan, the group was asked to select the top areas for NOBLE to address going forward. Because of the work that the group had done and shared in the previous two hours and fifty-five minutes, we were able to articulate and agree on seven goals in the final minutes of the session. They are listed below.

Potential Goals for NOBLE's Long Range Plan:

1. Training and Facilitation center for Noble members

2. Lead with technology

3. Streamline and simplify

    1. User access

    2. Policies

4. Data assessment (improve to be easier, more, sooner)

5. E-Content  (coordinate & advocate for)

6. Continuity (of knowledge and service offerings)

7. Advocacy for members (in all relevant areas

Conclusion and observations:

A three-hour planning session with over sixty people can be a daunting challenge. This group came prepared and had thought about what they appreciate about their network, what they want from them today and in the future. The group was thoughtful and worked well together.

There were some common themes expressed. A primary (and not new) role is that of NOBLE being a leader in technology. This meshes well with NOBLE's current mission statement "*to be the technology partner for libraries north of Boston*". The group also repeated the request for NOBLE to be the hub for resource sharing—human and technological. The members see a great deal of knowledge and resources in the network and they want them to be highlighted and shared. They see NOBLE as the facilitator of this process. This network is highly regarded by all members. When asked to what do they attribute this success, the responses included the qualities of strong leadership, good management, great communication, a high level of trust, being responsive to member's needs, and a history of service.

One can quickly ascertain relationships in a work environment and in an organization by observation of interactions. It was clear that this is an organization that is well managed and appreciated. The one time that a member had a request that included a comment of past performance it was prefaced with "this is not a criticism". While NOBLE works well today, there are some aggressive goals for the future and it will be up to the Executive Director and his staff to address them as they best see fit. I have not doubt that they will succeed with the goals that they select. I very much appreciate the opportunity to work with such a highly respected organization and to hear how the members would like to see NOBLE plan for the future.

Appendix
Additional notes from the groups that may not have been priorities (top 3-5)

Patrons should WANT to be in the library
Clone Elizabeth (!)
Anticipate changes, especially in new technologies
Resource instruction—improve ease of access
Connecting people to stuff they don't know about by exposure &/or use of
   technology
Library as destination/programs
Importance of showing value of libraries to stakeholders/powers that be
Reimagining our roles
Responsiveness
Letting go of old methods/ways
Adapt to change and be flexible
Need new facilities that are designed for new uses
More hours
Streamline E-content
Major mobile presence
More user power to drive library services (acquisitions)
Shift from print to electronic—disparity
Make library first stop for info on new technologies
RFID
Getting out in the community
Collaborating with faculty
Programming for all ages
Information literacy/lessons with different departments
Use of library guides, make them compelling, expand
Technology for people w/out computers
Make library more visible
Get more seating
Electronically resource older materials
More one on one
Meet peoples needs more long term
Budgeting gap from old to new
Configurable space
Self check out
Roaming librarians
More events
Maker space/modular
Adapt to changing population
Leverage Network assets
Ecommerce/smart cards

# Goals, FY2015-2019

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.

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.

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.

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.

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.

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.

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.

# Plan Methodology

The Executive Board of NOBLE is serving as the long-range planning committee for this update of our Strategic Plan.

The Executive Board consists of the five officers of NOBLE: President Patricia Cirone of the Beverly Public Library, Vice-President/President Elect Brian Courtemanche of Halle Library at Endicott College, Treasurer Karen Pangallo of the North Shore Community College Libraries, and Clerk Nancy Ryan of the Lynnfield Public Library, all elected by the Members of the Corporation. The officers are augmented by four at-large members of the Executive Board: Carol Gray of the Sawyer Free Library of Gloucester, Martha Holden of the Peabody Institute Library of Peabody, Linda Hummel-Shea of the Northern Essex Community College libraries and Myron Schirer-Suter of the Jenks Library at Gordon College. The Executive Director, Ronald Gagnon, serves as an ex-officio member of Executive Board.

The Strategic Plan revision has been a key issue addressed by Executive Board in FY2013 at monthly meetings.

In the winter, it was decided that the best way to gather member library input would be to schedule a large-group meeting using an outside facilitator. Owen Shuman was selected for her knowledge and experience in Massachusetts libraries. The meeting was held on April 3 and attended by 63 library directors and key library staff members.

The report compiled by Owen Shuman is contained within the Needs Assessment portion of this plan.

Based on input from the meeting, Executive Board developed a set of goals and long-range objectives

The Board also reaffirmed continuing our mission statement which is effective for it is easily remembered and understood.

The complete long-range plan was unanimously approved at the NOBLE Executive Board meeting of June 12, 2013 and recommended to Membership. The plan was unanimously approved by Members at the Annual Meeting on June 20, 2013.

# Technology Upgrades

NOBLE changed integrated library system in 2012, moving to a new open source Evergreen integrated library system. The migration was conducted as part of a larger project supported by a Federal Library Services and Technology Act grant administered by the Massachusetts Board of Library Commissioners.

Our Evergreen system operates on a multi-server platform consisting of 18 Dell servers acquired in spring 2011. The production system is supplemented by a smaller training and testing system also on a Dell server.

The hardware will need to be replaced, or incrementally upgraded, during the life of this plan, likely in 2016. As this coincides with the end of our existing lease, we will need to explore and consider moving to a cloud or hosted-elsewhere solution. Housing our system requires a computer room with its own climate control and power conditioning/backup systems which are difficult to accommodate in normal office settings, limiting our office location options and increasing the difficulty should a move become necessary.

The routers that form the backbone of our telecommunications network were installed in 2011, replacing our 2005 Cisco routers. Libraries depend on the network equipment for access to the catalog, electronic resources and the Internet. Central site telecommunications equipment provides library service 24 x 7 to users outside the library as well. Our Cisco 3845 central site router will be end-of-life in 2016 and our firewall and gigabit switch will be end-of-life in 2018, As technology and particularly security demands increase quickly, we must plan for the replacement of our network equipment to accommodate new technologies and bandwidth demands.

NOBLE must also plan to maintain the currency of our Web and mail servers. Both servers are well-used by our member libraries. Over 500 e-mail accounts are provided for the staff of member libraries and 18 member libraries host their web sites or provide other information via NOBLE's Web server. In addition, the web server hosts the NOBLE Digital Heritage collection, and supports images in the catalog. The acquisition of our current server in 2007 server was largely funded through a grant from Danversbank. We will need to consider replacement at the same time we examine the computer room vs. cloud hosting issues noted for our Evergreen server.

Desktop PCs will also need to be upgraded regularly. We plan to replace 20% of staff desktop machines every year. However, the biggest cost in this area will be simultaneously upgrading the 12 PCs in our training room which were last replaced in later 2005 and will need to replaced soon.

Our conversion to Comcast business class Internet service in 2011 for public libraries and conversion to Comcast Metro Ethernet at NOBLE allows us growth in capacity, both as Comcast increases business class service to stay competitive as well as paid capacity upgrades if needed.

# Financial Plan

A high level of service at a minimal cost is the goal of our financial planning.

## Operating Funds

Given the serious financial situations experienced by several of our libraries over the past few years, we have held our most recent annual increases to a total of 1% over the past five years, the sole increase occurring in FY2011. The level assessments were achieved through a significant savings in telecommunications costs from switching to commercial and institutional Internet service in place of a private dedicated network late in FY2011 and the switch to Evergreen for FY2013. However, the sharp decrease in telecommunications costs also brought a matching decrease in our telecommunications subsidy from the Mass. Board of Library Commissioners and the elimination of our Federal Erate funding for all but our voice lines.

## Capital and Contingency Funds

NOBLE has been successful in building up our capital funds since our upgrade to our Millennium system in 1999 which depleted most of our capital. Fortunately our Evergreen move was not as costly. As of May 31, 2013, NOBLE's capital account balance is $1,141,149.

To hold down operational budget increases, we have nearly eliminated contributions to our capital account as we achieved a satisfactory balance and did not have major capital expense in moving to our new Evergreen library system which had no software acquisition costs.

While the Mass. Board of Library Commissioners continues to provide support for many capital system expenditures through Federal Library Services and Technology Act funds, our future existence must not rely solely on this source of funds due to the situation around the Federal deficit. The MBLC has recently frozen funding for replacement library systems, favoring the Evergreen project being a model for Massachusetts.

NOBLE has set aside contingency funding to cover approximately six months operations as recommended by our auditor, a standard figure for non-profit organizations.

NOBLE's capital and contingency funds are presently invested in a series of investments principally at Beverly Cooperative Bank in a money-market account due to poorer rates of return for certificates of deposit. We also have a total of approximately $145,000 invested in two mutual funds, Fidelity Real Estate Income Fund and the Fairholme Fund.

In 1994, NOBLE expended approximately $100,000 on site relocation to our first independent location in Cherry Hill Park in Danvers. NOBLE renewed our lease at Cherry Hill in 1999 for an additional seven years, capitalizing on the prior site investments with only some minor alterations required. We again renewed our lease at Cherry Hill Corporate Center in 2010 for an additional five years through May 31, 2016.

## Safeguards

Our finances are audited annually by a certified public accountant with experience in federal and state funding. Our auditor, Robert J. Guimond, has worked with us to structure our financial procedures so that responsibility for NOBLE's finances is spread among staff members and officers for greater security and protection against fraud. In addition, NOBLE staff and officers are bonded to safeguard our finances.

## Future

Due to the foresight of the Mass. Board of Library Commissioners 30 years ago, all the state's networks have been fortunate to have much of our system capital costs funded by Federal and state funds administered by the MBLC as an investment to foster interlibrary cooperation and resource sharing. However, recent funding cutbacks at the state level have forced the MBLC to rely more on Federal Library Services and Technology Act (LSTA) allocations to fund ongoing operations, reducing the amount of LSTA funding available for capital funding for networks and other projects. With increasing deficits and budget reductions at the Federal level, and the elimination of state grant money, it is imperative that NOBLE prepare to be more self-sufficient for future capital outlays.

In addition to maintaining a healthy capital account, NOBLE will seek grant funding independently of the traditional MBLC channels where possible, including local and national foundations and governmental programs for NOBLE projects. NOBLE will also partner with groups of member libraries to seek special project funding. However, searching for grants, applying, coordinating and reporting place increased demands on NOBLE staff.

Likewise, since the rebound in ongoing state funding for networks has halted at just better than half of the sum available in the peak year of FY2001, state funding is not likely to provide any additional significant and sustainable support in the coming years.

NOBLE and our libraries must continue to support the efforts of the Mass. Library Association to restore and improve state funding to beyond the FY2001 levels. Clearly the expectations for telecommunications capacity and resource sharing, for which the networks receive state support, have grown significantly since FY2001, yet current funding is well below those levels.

Financial difficulties within NOBLE libraries also bring a financial challenge to NOBLE and our members. Many public libraries are dealing with Proposition 2½ limits, which combined with other increasing demands at the local level and variable at best state funding present a significant challenge to adequate funding of many NOBLE public libraries. At least one NOBLE private college member also experienced significant financial issues impacting their membership but has rebounded, and state support for its own higher education institutions has experienced a downward trend.

Continuing as a credible technology partner for our members in a time of increasing technological development and change will require an expanded investment in staff to keep NOBLE and our libraries current and viable participants in providing responsible and up-to-date service to our constituents. More products are being introduced at an ever-increasing pace. Gone are the days when a limited number of partner vendors gradually introduced enhancements. Today products are being developed quickly and distributed via the Web by small startups and major players in the information industry but often outside of the traditional library vendors. Use of other than traditional library vendors can help to make our libraries and services move findable to our users and potential users on the Web.

More staff time will be required to find out about, research and implement new products, and to safely and effectively interface them with our core systems, meeting our libraries' stated need for more and quicker technology support. The time spent in investigation by NOBLE can be a saving for member libraries as they consider new products. Additional software and software gateways will be needed for existing systems to keep them current and to accommodate the new third-party products.

NOBLE will also continue to work with member libraries and related organizations to seek out mutually beneficial opportunities to provide more optional services cost-effectively, including outsourcing opportunities and group purchases. Recent examples include Wowbrary and additional non-database EBSCO services.

# Membership Pricing Structure

NOBLE has two principal forms of membership, full membership and associate membership. A subcategory of full membership has been defined for school systems.

The cost of full membership is determined annually by dividing the cost of NOBLE operations into three components, With our new formula, passed in the spring of 2012 and going into effect with the FY14 budget, 75% of NOBLE's operating cost is divided equally among full members, 12.5% is divided by the number of active users and 12.5% is divided by the average of the past three years circulation. The new formula replaced one based on simultaneous staff users that had been in place for over a decade but no longer had any meaning with an open source system.

The annual NOBLE assessment has not increased in the last three years. In the past ten years, NOBLE's annual costs have risen 6.9% while the Boston consumer price index has increased 24%. In the earlier part of the decade we were still rebuilding our capital account after our prior system replacement which required greater increases.

Though not a recognized membership category, NOBLE does have an "affiliate" member, the Professional Library of the Massachusetts Board of Library Commissioners. The cost of this membership is decided annually, based on past charges and the rate change faced by full members.

Access to a comprehensive package of EBSCO databases is provided to all full members at a significantly-discounted, group purchase rate. Over 4,000 full-text periodicals are provided, covering general interest, business, consumer health and allied health areas. Additional databases are optionally available from EBSCO through NOBLE at a significant discount. Members also participate in shared OverDrive collection of ebooks and audiobooks.

School systems may join as a system for the standard membership fees and all of the attendant privileges. One school is entitled to NOBLE services for the initial membership fee with additional schools within the system charged at the rate for branch libraries.

Associate memberships are designed for small libraries with a collection of fewer than 15,000 items. At a reduced cost, associate members are non-voting participants, agree to enter all new acquisitions and convert existing collections within three years and are eligible for training and other NOBLE sessions.

Other optional services include onsite PC support, Web site hosting and editing, PC and printing management software and additional EBSCO databases at consortium rates. NOBLE also conducts group purchases of hardware and peripherals for members.

# NOBLE Member Libraries

**As of June, 2013**

## Public Libraries, full members:

**Beverly Public Library,**
32 Essex Street, Beverly, MA 01915

    Branch:
    Beverly Farms Branch Library
    24 Vine Street, Beverly, MA  01915

    Bookmobile

**Peabody Institute Library,**
15 Sylvan Street, Danvers, MA 01923

**Parlin Memorial Library,**
410 Broadway, Everett, MA 02149

    Branch:
    Shute Memorial Library,
    781 Broadway, Everett, MA 02149

**Sawyer Free Library,**
2 Dale Avenue, Gloucester, MA 01930

**Lynn Public Library,**
5 North Common Street, Lynn, MA 01902

**Lynnfield Public Library,**
18 Summer Street, Lynnfield, MA 01940

**Abbot Public Library,**
235 Pleasant Street, Marblehead, MA 01945

**Melrose Public Library,**
69 West Emerson Street, Melrose, MA 02176

**Peabody Institute Library,**
82 Main Street, Peabody, MA 01960

Branches:
South Branch Library,
78 Lynn Street, Peabody, MA 01960

West Branch Library,
603 Lowell Street, Peabody, MA 01960

**Reading Public Library,**
64 Middlesex Avenue, Reading, MA 01867-2550

**Revere Public Library,**
179 Beach Street, Revere, MA 02151

**Salem Public Library,**
370 Essex Street, Salem, MA 01970

**Saugus Public Library,**
295 Central Street, Saugus, MA 01906

**Stoneham Public Library,**
431 Main Street, Stoneham, MA 02180

**Swampscott Public Library,**
61 Burrill Street, Swampscott, MA 01907

**Lucius Beebe Memorial Library,**
345 Main Street, Wakefield, MA 01880

**Winthrop Public Library,**
2 Metcalf Square, Winthrop, MA 02152

## Special library, affiliate member:

**Mass. Board of Library Commissioners - Professional Library**
98 North Washington Street, Suite 401, Boston, MA 02215-2002

## Academic Library, associate member:

**Montserrat College of Art, Scott Library**
23 Essex Street, Beverly, MA 01915

## Academic Libraries, full members:

**Bunker Hill Community College Library**
250 New Rutherford Avenue, Boston, MA 02129

**Endicott College, Halle Library**
376 Hale Street, Beverly, MA 01915

**Gordon College, Jenks Library**
255 Grapevine Road, Wenham, MA 01984

**Merrimack College, McQuade Library**
315 Turnpike Street, North Andover, MA 01845

**Middlesex Community College Learning Resources**
591 Springs Road, Bedford, MA 01730

> Branch campus with library:
> Lowell Campus Library
> 33 Kearney Sq., Lowell, MA 01852

**North Shore Community College Library,**
One Ferncroft Rd., Danvers, MA 01923

> Branch campus with library:
> Lynn Campus Library
> 300 Broad Street, Lynn, MA 01902

**Northern Essex Community College, Bentley Library**
100 Elliott St., Haverhill, MA 01830-2306

> Branch campus with library:
> Lawrence Campus Library
> 45 Franklin St., Lawrence, MA 01840-1121

**Phillips Academy, Oliver Wendell Holmes Library**
Andover MA 01810-4161

**Salem State University, Berry Library**
352 Lafayette Street, Salem, MA 01970