OLD COLONY LIBRARY NETWORK

NEEDS ASSESSMENT

EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT

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UMASS
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EXECUTIVE SUMMARY

In May 2015, staff of the **Collins Center for Public Management in the John W. McCormack Graduate School of Policy and Global Studies at the University of Massachusetts Boston** was asked by the Old Colony Library Network's (OCLN) Personnel Committee to carry out a Needs Assessment and prepare a White Paper taking a fresh look at the current needs of the member libraries of OCLN, particularly in relation to questions regarding the OCLN's decision-making process in light of the need for new services in a time of technological change. In preparation for this paper, Center staff looked at data from other library networks, prepared a survey for OCLN members, visited six libraries, and had telephone interviews with six other directors. Survey Responses were submitted by 28 of the network's 29 libraries.

Old Colony Library Network is one of nine networks intended to promote resource sharing. Data collected by the Massachusetts Board of Library Commissioners are presented. Although making comparisons between networks is difficult because of the varying memberships, size of member communities, and differences in types of libraries, certain differences emerged. In FY2013 OCLN had the fourth highest circulation of the nine networks and the seventh highest operating expenditures. OCLN has the third highest Capital Improvement Fund, and employs the fewest Central Site staff except for Fenway Libraries Online (FLO) and Metro Boston library Network (MBLN). Discussions with three other networks about governance and decision-making also uncovered some differences in the decision-making preferences among networks. Member Services offered also showed some differences, and those can be seen in Appendix C.

Responses to Part 1 of the survey showed that while more than half (15) of the directors in OCLN have worked in their present position less than five years, another 11 have been in their jobs more than 10 years. Sixteen (16) libraries do not have at least one fulltime staff whose main responsibility is supporting the library's technology. Part 2 asked about network governance. The 28 respondents had served on a total 125 network committees, and 85% responded that the amount of time spent was about right. Only one said too much time was spent. Question 9 asked whether the Executive Director should be a more proactive position. Twelve libraries either agreed or strongly agreed while seven disagreed or strongly disagreed.

The responses indicated a high need for additional training. Seventeen libraries showed an interest in having central site staff meet with them on Technical Service workflow. A similar number showed an interest in having local links, such as specific library resources outside of OCLN on the front page of the catalog. A question on e-content expenditures showed half the network thought the amount currently spent was too low while seven more thought it just right. Another question showed that 16 libraries agreed with increasing their assessment to purchase additional ebooks, eight disagreed, and several commented that it depended on how that was assessed. The questions asking about member satisfaction with the eservices showed the most support for the shared Overdrive Collection. Twenty-two libraries find value in that service.

Question 24 was open-ended. It asked libraries to comment upon what new services or collections they would like to see OCLN add. Responses varied from a statistics package, more staff, and an online bill pay service for patrons, to many different types of e-content. Question 25 asked what unmet needs might be met by the addition of OCLN staff. Several responses mentioned website consulting, a liaison to improve communication, professional help with marketing and PR, online instructional guides, and training in new services. Also mentioned was the need for academic libraries for e-content more specific to their student populations. Question 26 asked for any other comments, including those that might be confidential. The topics of communication, decision-making, training, and evaluation were all needs mentioned.

Center staff visited six libraries and had telephone interviews with six other directors to follow up on the survey results. Their comments and observations helped to form the following recommendations for follow-up discussion and action:

- Additional staff training in the use of eResources.
- Additional Technical Assistance to help meet expressed needs. Not all the libraries have the same needs for this service and it should be tailored for individual libraries.
- Communication of what services are currently offered seemed to be an issue. The responses to the survey and follow-up discussions showed a lack of understanding in some cases that certain services, including on-site training are currently available.
- Selection and Evaluation of eResources – it was mentioned by several libraries, most especially the academics, that the eResources selected do not meet their needs. Libraries also mentioned their desire for online music and video services.

Appendix A is a list of the names and libraries of the directors interviewed during the data gathering stage of this report. Appendix B provides information on the Background of the Center staff involved with the preparation of the report. Appendix C is a collection of data allowing for a comparison of OCLN and MVLC libraries. Appendix D is an MBLC report of Member Services Provided as of June 30, 214. Appendix E is the Executive Summary from Rising to the Challenge: Re-envisioning public libraries, a report of the Aspen Institute Dialogue on Public Libraries, by Amy K. Garmer, Director. This report is intended to provide an overall summary of the larger context within which OCLN and its libraries operate.

INTRODUCTION

In spring 2015, the Personnel Committee of the Old Colony Library Network (OCLN) invited staff of the Collins Center for Public Management to begin discussions about how the Center could be of assistance to OCLN. After discussions about the Center's capabilities, the Personnel Committee invited the Center to prepare and submit a Scope of Services for the preparation of a Needs Assessment for OCLN. The Needs Assessment concept focused on taking a fresh look at the current needs of the member libraries of OCLN, particularly in relation to questions regarding the OCLN's decision-making process in light of the need for new services in a time of technological change. The assessment was not conceived of as a *study* that would make formal definitive recommendations. Rather it was conceived of a catalyst to discussion among OCLN's Membership and Executive Board.

In April 2015 OCLN approved the project. The methodology for this project is described in the next section. Detailed information about the Collins Center and the project consultants is presented in Appendix A.

The preparation of the Assessment was carried out by Richard Kobayashi and James Sutton. Mr. Kobayashi has extensive knowledge of local government in Massachusetts and Mr. Sutton was formerly the Director of the Andover and Natick Public Libraries.

In the course of reading this paper, reference is made to the **Massachusetts Regional Library System** and the role it formerly played in providing leadership and training for Massachusetts Libraries. As stated on the Massachusetts Board of Library Commissioners website, "*On July 1, 2010 the new Massachusetts Library System (MLS) will begin operating as the sole provider of regional library services for the more than 1700 public, school, academic, and special libraries across the state. These services were previously delivered by six regional library systems but FY2011 state budget reductions necessitated restructuring and consolidation into one system that will provide core library services such as interlibrary loan*." The impact of this reduction in services, particularly on the opportunities for training, has continued to be felt by the libraries and networks in the Commonwealth.

The Members of the Project Steering Committee who interviewed the Center Team and worked with them on the preparation of the Needs Assessment and Retreat are:

> Rebecca Freer, Chair, Norwell Public Library
> Mark Lague, OCLN President, Canton Public Library
> Susan Watkins, Neese Library, Eastern Nazarene College
> Carol Jankowski, Duxbury Free Library
> Rob MacLean, Tufts Library, Weymouth
> Megan Allen, Thomas Crane Public Library, Quincy
> David Slater, Executive Director, Old Colony Library Network

METHODOLOGY

In carrying out the tasks associated with this White Paper, the team was guided by a Project Steering Committee composed of the OCLN Personnel Committee and the Executive Director. The following steps were contained in the Scope of Services:

Information Gathering

Task 1. Confirm, describe and document the existing services provided by OCLN, its institutional basis and financing system. The Center Team will review OCLN materials, interview the Director, key staff and key officers.

Task 1A. Gain familiarity with other RLNs in MA that may have addressed some of the issues that are likely to emerge in the OCLN Needs Assessment

Task 2. Prepare a survey of Directors that helps identify unmet needs. The survey will focus on technical, material acquisition, and training as well as other matters that may be identified by the Project Steering Committee

Task 3. The Center team will interview six members of OCLN from various sized libraries during in person on-site visits and six members of OCLN during telephone interviews after the surveys have been refined to further refine/understand member preferences.

Document Preparation

Task 4. The Center team will prepare a White Paper that describes and summarizes the information obtained in the first three tasks. The purpose of the White Paper will be to stimulate discussion among key actors in OCLN and among the broader membership about the emerging needs of the membership in way that can foster broad and inclusive discussion and debate. The White Paper is anticipated to be the principal focus of discussion at the retreat in Task 5.

Task 4 Deliverable: White Paper

Facilitated Discussion/Retreat

Task 5. The Collins Center will assist OCLN design, plan, and conduct a one day workshop focused on:

1. Further articulating the needs identified in the survey and interview process
2. Prioritizing those needs
3. Identifying action steps required to enable the organization to meet prioritized needs.
4. Center will document decisions made by the membership at the retreat.
5. Center will identify a venue for the retreat in collaboration with the Project Steering Committee. Business arrangements with the venue will be the responsibility of OCLN staff.

Task 5 Deliverable – Documentation of decisions taken at the retreat.

Task 6. Following Task 5 Center staff will meet with OCLN officials to identify specific tasks that will help OCLN promptly commence the implementation actions needed to address priority needs, recognizing that these emerging needs will need to be addressed while maintaining current services.

OCLN AS ONE OF NINE AUTOMATED RESOURCE SHARING NETWORKS

OCLN is part of a state-wide structure intended to promote resource sharing. The Massachusetts Board of Library Commissioners describes the networks on its website:

> *In Massachusetts, the books, magazines, CDs, DVDs and e-content (eBooks and downloadable audio and video) for approximately 320 public libraries, 43 academic libraries, and a small number of school and special libraries can be found through the nine automated resource sharing networks.*

For 10 years, MBLC has put on its website "*Massachusetts Library Data, Automated Resource Sharing Networks Report*." The latest year available is FY2013 (July 1, 2012 – June 30, 30, 2013). This report may be seen in its entirety at:

http://mblc.state.ma.us/advisory/statistics/network/net13_complete_report.pdf

All numbers used in the following comparison are from the FY2013 report.

Using the information in these reports to compare OCLN with the other networks is difficult because of the differences in libraries and populations served. The following data have been extrapolated for consideration to help place OCLN within some context relative to other automated networks. Although all the networks have an automated catalog, it cannot be assumed that the services provided are the same. For example, e-resources differ and change from year to year.

The Central/Western Massachusetts Automated Resource Sharing network (CW MARS) has 135 public libraries, 10 academic libraries, two school libraries, and one special library. It is the largest network in the state in terms of number of members and largest in total operating expenditures, $2,638,091 compared to OCLN's $954,877. OCLN's expenditures are lower than any other network except FLO and SAILS. The Minuteman Library Network (MLN) with 35 public and 7 academics has the largest total circulation, 16,142,149, compared to OCLN's 5,572,612. The number of FTEs at networks varied from CW MARS' 21. 4, MLN's 14.8, NOBLE's 10.7, and MVLC's 10.4 to SAILS's 7.6, CLAMS's 6.5, and OCLN's 6.4. OCLN employs fewer staff than all other networks except FLO and MBLN, both of which have far fewer libraries. One particular figure that stood out in the report is OCLN's Capital Improvement Fund. OCLN's $900,000 was the third highest amount. OCLN also has a sizeable "Stabilization Fund" and it may have the highest amount of cash reserves.

Figure 1: Data taken from "Massachusetts Library Data, Automated Resource Sharing Networks Report FY 2013"					
	Full Members Public/Total*	Total Operating Expenditures	Capital Imp. Fund	Total Circulation	Staff in FTE (35 hrs/wk)
CLAMS	34P/35T	$731,572	$ 494,040	3,567,960	6.5
CW/MARS	135P/148T	$2,638,091	$ 614,413	13,395,595	21.4
FLO	0P/10T	$665,729	$ 1,023,789	241,585	3.8
MBLN	3P/8T	$1,462,365	$ -	3,694,546	3.3
MLN	35P/42T	$2,103,644	$ 613,754	16,142,149	14.8
MVLC	35P/35T	$1,237,461	$ 211,678	6,099,865	10.5
NOBLE	17P/28T	$1,355,816	$ 1,141,149	3,294,571	10.7
OCLN	26P/28T**	$954,877	$ 900,000	5,572,612	6.4
SAILS	38P/63T	$1,060,085	$ 650,000	4,295,063	7.6
Total	**0**	**$12,209,640**	**$ 5,648,823**	**56,303,946**	**85.0**
*Total includes School, Academic, and Special Libraries					
**OCLN has added an academic library since 2013					

In terms of the population and services offered, OCLN with its 29 public and three academic libraries may compare most closely to Merrimack Valley Library Consortium (MVLC) with 35 public libraries. Using data from the latest MBLC annual report statistic, a list each network's municipalities and their populations with holdings, circulation, and number of borrowers is included in Appendix B1 and B2. A comparison of OCLN and MVLC in terms of overall network data is in Figure 2:

Figure 2: Selected Statistics taken from: Massachusetts Library Data		
Automated Resource Sharing Networks Report FY2013 (July 1, 2012 - June 30, 2013)		
	OCLN	MVLC
Total Members/Sites	**28/37**	**35/38**
Financial Information		
Total Operating Expenditures	$954,877	$1,237,461
Network Telecommunication Exp.	$38,895	$65,256
Capital Improvement Fund	$900,000	$211,678
Circulation Information		
Total Circulation	5,572,612	6,099,865
Total eBook Circulation	103,327	81,665
Total Downloadable Audio Circ.	24,218	37,963
Resource Sharing Information		
Number of Titles	973,345	882,721
Number of Items	3,123,945	3,207,613
Staffing		
Number of Staff	**6.0**	**10.0**
FTE (35 hrs./wk.)	**6.4**	**10.5**

Part of the difference in staffing and expenditure may be explained by the fact that MVLC provides home page hosting for five libraries, centralized pc management for 35 libraries, on-site PC support for 21 libraries, and on-site advising consulting. OCLN does not offer these services. Appendix D is a chart showing a comparison of "MEMBER SERVICES PROVIDED AS OF JUNE 30, 2014."

DISCUSSIONS WITH OTHER NETWORKS ON DECISION-MAKING

OCLN's Project Steering Committee had brought up the question of governance and decision-making. It posed the question: Does OCLN operate in the optimal decision-making style of today? To help answer this question, the Executive Directors of OCLN and other networks were asked for their thoughts on how their networks were able to reach decisions and effect needed change. Telephone conversations were held with the Executive Directors of three other networks – Debbie Conrad at SAILS, Susan McAlister, MLN, and Eric Graham, MVLC along with Beth Mazin, Director of Memorial Hall Library in Andover.

Deborah Conrad, Executive Director of the SAILS Library Network, said that the impetus for change comes from the central site office, drafted by staff, and is then reacted to by the directors. As an example, the Executive Director wrote the Technology Plan using input from a survey on of members and discussions with library directors and staff. The SAILS Personnel Committee is chaired by the Past-President who usually stays on the committee, providing continuity from year to year. The Executive Director does a self-evaluation and the ties the strategic plan into the guaranteed services levels. SAILS has no committees in its bylaws except the Board and Offices. They do have secondary committees such as the Overdrive Committee. The bylaws have not been changed much since the network's inception. They are eight pages long. By comparison, OCLN's bylaws are 14 pages. Ms. Conrad noted that the libraries want help in implementing technology, including setting it up and being trained in its use.

Susan McAlister is the Executive Director of the Minuteman Library Network (MLN). She noted that it gets harder to make the network be as "member-driven" as turnover occurs. She noted that in terms of technology, change goes from the Central Site to the members. She has been in her role since 2004. She said that MLN has moved away from "silo" committees and turned them into "interest groups." She mentioned a "Standards Working Group," an "Innovation and New Technology Group," and a "Digital Content Group." This last group is working particularly hard. She said it is important to "try and engage people where they are." In regard to the Executive Director's annual review, each year the Board votes objectives and activities. Progress toward these goals form the basis of the Director's evaluation. The Executive Director goes through all the activities in terms of what got done and what didn't. The past-president spearheads the evaluation and the new vice-president is brought in. Susan remarks that she feels good about the process. When they did their review of their organization, they went to a nine-member board with a three-year commitment so that they always have six members continuing from one year to the next.

Eric Graham is the Executive Director of the Merrimack Valley Library Consortium (MVLC). Although he has many years of experience in library automation, he is the most recently hired of the network directors. In terms of where the impetus for change is coming from, he said that the bylaws allowed change to work both ways. Library Director Beth Mazin from Andover said that the network remained strongly member-driven. MVLC has 16 of its libraries in communities under 10,000 in population (compared to two in OCLN.) Small libraries are not able to engage in as many committee meetings. The Central Site staff can offer data on policy

choices and carry out the change. MVLC has a 10 person Executive Board. A Nominating Committee chaired by the Part-President presents a Slate of Officers and Members-at-Large to the Membership one month before the Annual Meeting. The Past-President also oversees the standing Personnel Committee that is stable as long as the members remain on the Executive Committee.

SURVEY ANALYSIS

The survey was constructed with the intention of measuring library preferences for governance and to determine if there were needs for possible services the network could provide. Twenty-eight of the network's 29 libraries responded. The following paragraphs will highlight the findings.

Part I – Background

Q1 and Q2 asked for the respondent's name and the name of the library. Q3, which asked how long the respondent had been in their current role, showed the following pattern of service by the network's directors:

Figure 3:
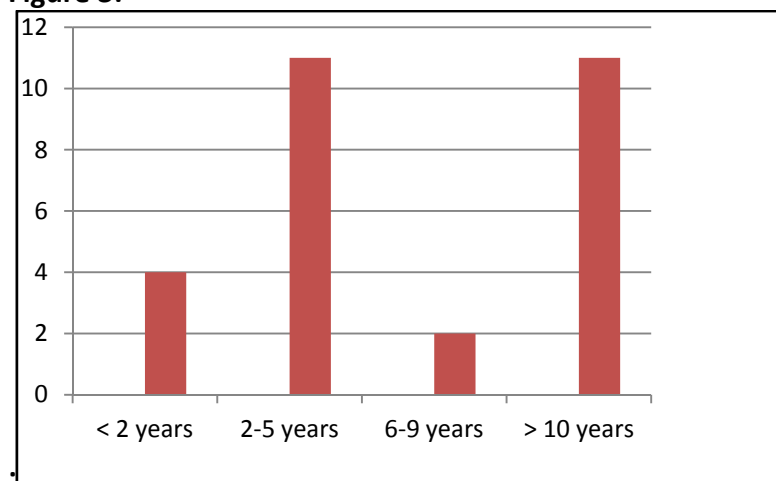
More than half of the network directors have been director of their OCLN library less than five years. However, 11 have been in their jobs more than 10 years.

Q4 showed that 25 public and three academic libraries responded to the survey. Q5 asked about the size of the municipality the public library serves. Nineteen of the 28 libraries are in communities 10,000 to 50,000. Twelve of these libraries are in communities less than 20,000 population. The three academic libraries serve student populations of 4,500, 2,800 and 1,100.

Q6 asked, "Does your library have at least one fulltime staff whose main responsibility is supporting the library's technology?" Sixteen libraries, more than half, do not have a full-time staff person in this role while 12 do.

Part 2 - Network Governance and Decision Making

Q7 asked about participation in the various network committees. Twenty-eight respondents had served on a total of 125 network committees. This commitment has been necessary in the kind of member-driven network OCLN has been and is. It will also be necessary if the network is to continue in that mode of operation:

Q8 attempted to ask Directors if they thought they and their staff were spending the right amount of time, too much time, or too little time attending network meetings. More than 85% responded they spent about the right amount of time. Three libraries indicated too little time and only one thought too much time. If there is much concern with the present governance structure because of the amount of time being spent in committee work, this question failed to reveal it.

Q9 was intended to be a key question in terms of discovering a preference for how the network decision-making process should go in the future. The assumption being that a more pro-active Executive Director would be the initiator of service goals and make recommendations to the Membership for their approval rather than relying upon the Membership to reach some consensus before charging the Executive Director with a task.

Figure 4:
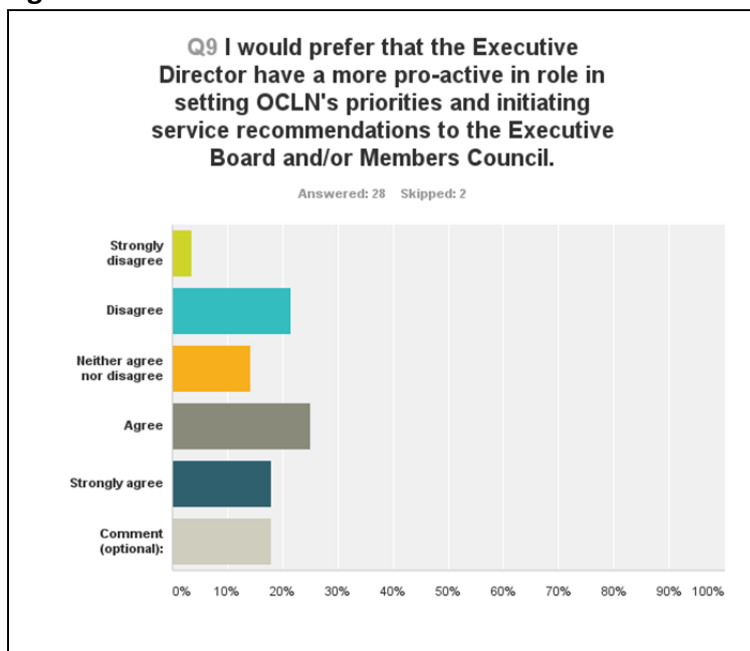
While 12 libraries (43%) either agreed or strongly agreed with this statement, seven libraries (25%) either disagreed or strongly disagreed. One respondent who did not check a box indicated in the comments:

- *"This is no reflection of the Executive Director, but rather the model that has been used in the past. Everyone wants their own way to some degree making it difficult to get things done quickly."*

Other comments were –

- *"I think that OCLN directors and executive director have a highly functioning collaborative relationship-- a partnership."*
- *"The Executive Director IS pro-active..."*

- *"I feel the Executive Director maintains a nice balance of helping us set priorities and initiating service recommendations."*

Indeed, there may have been some perception that this question was a reflection on the Executive Director, rather than a question about how the process might change in the future. The way a network reaches decisions is not entirely one way or another, and does depend finally on the collaboration and trust of everyone. The question was meant to get at whether or not OCLN preferred the current style of decision-making or thought the Executive Director's role could be increased. This question will be discussed again later in this report.

Q10 asked whether libraries would like the network to consider and evaluate content and software that could be purchased by groups of libraries, even if the whole network did not purchase the products. With 23 of 28 respondents choosing either "Agree" or Strongly Agree," there was consensus about the desirability of this way of ordering software.

Part 3 - Personnel Committee

Q11 asked if respondents had served on the Personnel Committee and if they found the process satisfactory or not. Thirteen answered that they had been on the Personnel Committee. Three of the 13 respondents found the process unsatisfactory and another seven found it satisfactory with some reservations. Six respondents made comments –

- *"Continuity would be best--clunky system."*
- *"Continuity from one year to the next is lacking, with new and inexperienced committee chair each year; this leads to inconsistency in the evaluation process."*
- *"Personnel Committee needs a consistent evaluation process and an updated job description for the Executive Director"*
- *"In my role as "past president" I was charged with evaluation of executive director's job performance. I don't remember any problems with the process...."*
- *"The process was not well documented or clear and raised many questions. That incarnation of the Personnel Committee came up with many recommendations, one of which evolved into the study you are now conducting."*
- *"The form is lacking-there is little information about the staff he manages provided to the Committee-and the committee itself changes from year to year. Evaluations should be tied to the organizations strategic plan and the individuals achieved goals and objectives."*

Part 4: Network Services

The responses to questions 12 through 15 showed significant interest in the type of assistance OCLN staff could give on an as needed basis, provided sufficient staffing was available.

Figure 5:	Yes	No	Unsure
Q12 - Meet w/ lib. Staffs on Policies and Procedures?	**14**	**8**	**6**
Q13 - Meet w/ lib. staffs on Technical Service workflow?	**17**	**6**	**5**
Q14 - Consult on Technology needs for new buildings, renovations, and other special projects?	**11**	**9**	**7**
Q15 - Local links, such as specific library resources outside of OCLN on the front page of the catalog?	**17**	**2**	**9**

Q14 comments had to do with the "as needed" basis for this service and the following:

- *"The Central Staff could provide more information and support on such things as scanners, self check machines and Wi-Fi."*
- *"Would rather see more online resources on OCLN staff webpage or wiki than actual site visits."*

Q15 solicited the following six comments:

- *"local color palette, logo, calendar"*
- *"Facebook Page, Library's website"*
- *"Only if this can be done easily and be customized for each library."*
- *"I support the option for local customization - however I would avoid cluttering the catalog with extraneous information available elsewhere. Logo & color branding would be a plus, especially to know for certain which OPAC a patron is on whten(sic) troubleshoot over the phone."*
- *"Customization is always helpful"*
- *"Branding, library announcements, etc."*

Q16 showed that libraries depended upon a wide variety of resources for technical and networking support. Most libraries depended upon a variety of resources with 22 libraries depending upon library staff for at least some of that support and 15 libraries Municipal IT. The comments to this question mainly had to do with the names of vendors used by various libraries and will not be included here.

Q17 was open-ended, asking what OCLN can do to facilitate the relationship between your library and the providers of its technical and networking support. Seventeen comments were made in response. Many said that things were fine or that it wasn't an issue at the present time:

- *"Training coordinator for new staff and new Directors"*
- *"OCLN staff already seem to work effectively with third-party vendors as needed."*
- *"Improve communication between OCLN and municipal IT so that they can work together when needed for troubleshooting problems."*

- *"Be sure that the OCLN "contact person" remains the same until the problem is resolved."*
- *"What would be a great help is to send a memo out stating what the minimum system requirements are for hardware and operating systems in order to efficiently run WorkFlows. A perceived "mandate" from OCLN would help to get things done quicker."*
- *"Our Technology issues are only a small part of out IT departments concerns - we don't have the control over time and availability that the public libraries may have."*
- *"Having OCLN meet annually with our Town IT Director would be wonderful. Often times OCLN has specific requirements for servers etc. that our town may not know about."*
- *"OCLN staff has worked well with our campus and library staff."*
- *"You help us whenever we ask."*
- *"Network-supported software and vendor suggestions."*
- *"OCLN has helped us set up tickets regarding connectivity issues. That's the sort of support we need on OCLN's side."*
- *"Many of us have two networks, and working with IT to facilitate that and make it as seamless as possible would be helpful."*

Q18 asked the following: "For FY16 OCLN has budgeted $43,200 for Overdrive & Zinio Platform Fees and $105,000 for content (Overdrive, Zinio and Commonwealth Ebook Collections) with $60,000 of this amount to be funded from reserves. The budgeted amount for shared e-content is too high, just tight, too low, or unsure." Half the respondents (14) answered that the amount was too low, seven more thought the amount just right, six were unsure, and one library thought the amount too high. While the high number of responses agreeing with spending on e-content shows an acceptance of this role by the network, comments made regarding how this service should be continued showed a diversity of opinion:

- *"More is always better."*
- *"We need to be able to meet current demand for e-content if we are to remain relevant and responsive to our patrons."*
- *"We don't get value for this expense."*
- *"I would like to see money re-allocated to fund the proven winners. If the Commonwealth Ebook Collection fails to prove widely useful after a second year I am not sure we should continue to fund it."*
- *"I believe the bigger question would be if the network will be focused on content. Are shared collections the best way to deliver digital content? It goes beyond amount and these particular purchases."*
- *"As an academic library these resources are not much used by our community."*
- *"I mean, the more we can do, the better."*
- *"Commonwealth Ebook too new to know yet."*
- *"I would like the ebook process re-evaluated. Right now, those of us who add money to the collection buy using our dollars for network-wide books get no reward. There should be some off-set, as there is with Circ, to lower our yearly fee based on content purchased."*

- *"I think we should be focused on Overdrive and purchasing more copies of items with long holds list."*
- *"We need to spend more on content, even if it means increasing our own fees."*

Q18 asked the respondents if they would agree or disagree with an increase in their assessment to purchase additional ebooks. Sixteen libraries either strongly agree or agree while eight either disagreed or strongly disagree. Comments were:

- *"Only if we have to."*
- *"I would want the opportunity to add as I can afford to when I have the funds available."*
- *"As long as ALL libraries increase their assessment proportionally so that the cost of purchasing additional e books is fairly and equitably shared."*
- *"Shared collection funding and development mechanisms should be explored such as…"*
- *"I don't want my assessment to increase."*
- *"I think the assessment is adequate and can fund increased spending for ebooks."*
- *"It would be dependent on the platform/vendor selected."*

Questions 19-22 used a Likert Scale to try to measure OCLN member satisfaction with four different services. The responses are summarized in this chart:

Figure 6:	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
Q19 - I support increasing my assessment to purchase additional E books.*	4	4	5	11	5
Q20 - The shared Overdrive Collection is an OCLN service I value.	1	0	5	7	15
Q21 - The shared Zinio Magazine Collection is an OCLN service I value.	1	6	5	10	6
Q22 - OCLN's participation in the Commonwealth Ebook Coll. program is an OCLN service I value.	3	2	9	9	5

These services are all recent additions and evolving. The "Agree" and "Strongly Agree" responses are positive indications for continuing the service. The Shared Overdrive Collection drew the largest positive response and might be considered as a model for future increases. Discussions with Directors in their libraries and on the telephone showed a need for more support in some cases to promote the use of these new services.

Q23 posed the following statement: "I support an overall assessment of OCLN staffing to see if there is a need for a realignment of job responsibilities and/or a new position to help address member needs." Seventeen of the 25 respondents indicated they strongly agreed and another eight indicated they agreed. The two comments made indicate the sense that with the

evolution in the network's responsibilities, there needs to be a re-examination of job responsibilities as well.

Comments:
- *"It seems that some OCLN jobs have developed ad hoc in response to various and changing needs of the moment but without long term planning, leaving library staff often unsatisfied with OCLN staff responses and communication and not sure if they are working with the best person to handle a particular situation."*
- *"It seems that staffing is the same as it was years ago. Perhaps there are changes without changing titles? How does digital content impact roles and workflow?"*

Below are the 18 responses to Q24 which asked: "What new services or collections would you like to see OCLN add?"

- *"Shared public events calendar."*
- *"A director's package that could be used for collecting data statistics all in one place. Bill paying online. Some networks have staff that trouble shoot technology problems by visiting locations. The way we do things now is fine but perhaps it could be a cost savings if we participated as a consortium."*
- *"A network-wide approach to providing streaming media would be worth exploring (e.g. with hoopla, network could leverage tighter integration with catalog/easier user interface)*
  -improved digital magazine collection (Zinio content is good but user interface very challenging) --electronic bill payment (credit cards) --make the online library card registration work!
  -an acquisitions module
  -a web-based staff client
  -better collection use reporting
  -tighter integration with common social media platforms (so, say, patron can share the latest book they read with the Facebook friends)
  -better, more seamless identification management, i.e. let people authenticate with their Facebook account
  -an OCLN app that can rival Boopsie
  -all hoopla titles in Enterprise via ErC
  -Chinese language OPAC interface"
- *"I would like to see another staff member hired to handle and coordinate training."*
- *"Streaming video; ability to take credit card payments integrated with the ILS."*
- *"Genealogy databases."*
- *"A streaming music or video service although I do not believe there is one out there that does business with consortia that is good enough. A digital collection within the catalog for discoverability of local history items (photographs, yearbooks, etc.)--or cataloging that links to those items that are on the Internet Archive. Marketing and PR help-- templates of flyers, posters, bookmarks for programs; press releases with customized*

data that members could use; and sending out press releases, writing op-ed columns, etc., on behalf of OCLN—raising OCLN and member libraries' profiles in the region."

- *"More digital collections"*
- *"Digital video and music, probably Overdrive periodicals and newspapers in addition to Zinio"*
- *"New technology information that is out and available or trends in the library field. What are other local libraries providing their residents etc."*
- *"Shared collection of downloadable and/or streaming movies and music."*
- *"It seems OCLN is doing a good job supporting e-content, which is what I tend to think of here."*
- *"Unsure"*
- *"A better more user-friendly periodical platform."*
- *"Possibly some sort of streaming move/TV service".*
- *"Streaming music-HOOPLA?"*
- *"I would like OCLN to have an online bill pay service for patrons. I would like OCLN to have a collection development software. Revamped OCLN website (happy to help with this) Work on a way to allow our network libraries to work with credit cards network Wi-Fi (which I know is being working on)"*
- *I think OCLN could use more staff, so they can have someone dedicated to onsite training as necessary. eResources are growing and we may need more staff to deal with this increase, especially if it is cutting into the Executive Directors time.*

A similarly open-ended question, Q25 asked respondents, "If your library has unmet needs that might be met by the addition of OCLN staff, please describe those needs." The 18 response were:

- *"See above."*
- *"Website consulting: it would be really helpful if there was a web development expert at Central Site conversant with commonly used web CMS who could assist libraries with their websites marketing/training: there is a great need for better marketing of new services (and training in how to use them) to member library staff; and also assistance for member libraries in marketing these services to the public (e.g. templates, graphic design, etc.)"*
- *"See 1. Above"*
- *"OCLN outreach liaison to libraries - a person whose job is to improve communication between OCLN staff and network libraries and provide various training at individual libraries; also, a collection development specialist who can dedicate time to developing e-content specifically for shared collections if we are to continue increasing network funding for these purchases."*
- *"Patron/Staff interactions. Customer Service."*
- *"Professional help with marketing and PR. Perhaps a legislative breakfast geared towards selectmen, town managers, mayors, councilors. Help with identifying practical trends that may be of use to patrons (i.e., Randolph's circulating Wi-Fi hot spots)."*

- *"Creation of instructional guides in a variety of formats to assist public (and staff) to access and use OCLN services effectively."*
- *"Management of electronic resources continues to grow in size and complexity. This is an area where the academics need more service which if done correctly offsets the other services from which we really don't benefit."*
- *"Training for staff on database, technology and other products we purchase .At times it would be easier to send staff to a training then try to schedule training in house between staff and a librarian etc. It's difficult finding the time to provide in house training between staff. People get distracted, interrupted, and off topic at times when training together in their own library setting."*
- *"The in-house training mentioned earlier in the survey as well as clear and concise OCLN staff page how-to procedures."*
- *"no"*
- *"training"*
- *"Staff training, creating guidelines and handouts that can be modified by libraries (right now, we all spend a lot of time reinventing the wheel for shared resources)."*
- *"Staff need training on every new service that we provide. It would also be helpful to have a technical team that could travel to libraries to assist with special tech projects."*
- *"I think an evaluation of current workflow would need to be conducted before I would take a stance on more staffing. However, the needs that are unmet are listed about under "what I would like to see". I feel as though our network is falling behind our neighboring networks."*

Q26 asked respondents to Please add anything else you think would be useful for this report and for discussion at the fall retreat. The following trends were contained in the 11 responses:
- *The Executive Director and staff are very knowledgeable and library directors and their staff depend upon them. They are generally knowledgeable about trending technologies and bring a lot to the discussion of what products to purchase and how to use them.*
- *Communication between Central Site Staff and Member Libraries is sometimes unclear and could be improved. In terms of communication, more rather than less is better.*
- *More consensus among the libraries is needed. This can be helped by more communication including a wider understanding of OCLN policies by Trustees.*
- *More training coming from Central Site staff would be appreciated, especially in the use of e-content. As well as improving overall understanding of products such as Zinio, on-site training would also improve Communication between central site and library staff.*
- *More evaluation of products, especially upgrades and new products would be useful.*
- *The survey and follow-up retreat are a great start to a continuing process that may result in OCLN playing an even more important role in a digital future.*

SUMMARY OF LIBRARY VISITS AND TELEPHONE DISCUSSIONS

To follow up on the survey responses, Center staff made six library visits and conducted six telephone conversations with other library directors. The libraries were chosen by the Project Steering Committee with an eye to balancing the size and type of the libraries. Visits were made to Avon, Brockton, Milton, Norwell, Quincy College, Randolph, and Whitman. Telephone conversations were held with the directors of the libraries in Canton, Cohasset, Hanover, Plymouth, Sandwich, and Sharon. The following discussion attempts to summarize the comments as they pertain to the key issues discussed in the interview.

Decision-Making/Network Governance

The issue of whether or not the Executive Director, as a position, needed to have more authority to be more proactive was discussed in each interview. Responses varied. One director said, *"It would be better if David were driving the bus – he's the manager. OCLN's so committed to member-driven."* Another commented, *"The Executive Director has the broader view while each library has their own interests. The broader view needs to prevail."* Another director commented that "our ability to make decisions seems thwarted." Several other directors made the point that the Executive Director could have more authority. Another said, *"…there is more of a role for the Executive Director."* Yet others said they were fine with status quo. One said too much power in the Director can be harmful and she/he likes to think it's very collaborative and has no issue with the current set-up. Other directors have indicated a continuing commitment to the member-driven process despite the recognition of the inefficiencies. As previously noted, the responses to the survey also varied.

The roles of the Executive Director and the Executive Board are discussed in bullet three of Other Observations in the Observations and Recommendations section of this report.

Network Policies – Several directors talked about the need for more consistency in the rules of the network. One commented that it was "difficult to get agreement, can't agree on fines or loan period." Another director mentioned the political need for each library to set its own standards. A director commented that it is like a states right versus central authority question. Another mentioned being tired of going over this ground again. A discussion could be held to sort out what it is that libraries can and must agree upon. The difficult to resolve questions right now seem to involve the acquisition and use of e-content. These are relatively new questions and may take time to resolve. There will be times of uncertainty as the new technologies are implemented.

Emerging Technologies

Libraries are going through a time of massive change in the way they provide services. Depending upon one's perspective, the Digital Revolution has been changing our lives since the 1950s to the late 1970s. For most of Massachusetts Libraries, the creation of automated

networks in the 1980s marked the transition from the old card-based catalogs to digitized databases. Since the 1980s, the changes in technology have resulted in an emphasis on the internet as the major source of information and an increasing number of e-resources. OCLN's libraries have recognized this fact and moved to use their network as a platform for the new content. Although there may be some disagreement about the value of current OCLN services, the disagreement has more to do with the support members feel is needed to market the services and support their use.

- The director of a smaller library expressed her frustrations with Zinio:

  Now it's up and running – not as good as thought. It's a good idea but our patrons don't use it. It's hard for small libraries to get people to attend committee meetings. There's a need for an electronic sandbox, so people can see exactly how electronic books work. Ebooks are not circulating here.
- The needs for this library revolve around customer service including PR materials personalized to the community, IT support, and personalization of home page.
- The Director of a library in a community of more than 30,000 talked about wanting to see the network working on Wi-Fi scenarios. Online Public Access Catalog Stations (OPACS) should be run off the Wi-Fi. Also, libraries need a way for their patrons to pay with credit cards; it's too limiting to take cash. She/he wants to see the network be more innovative. The committee structure is not working. Feels Zinio has been a flop and the Mass eBook program is not working.
- The director of another smaller library would like the network staff to evaluate products, the ILS, etc.
- Several directors mentioned the role OCLN could play in technical assistance, training and consulting.   Shared training resources would be useful to all libraries. Recommendations for hardware will be appreciated.
- Another director also indicated that her staff sometimes felt frustrated implementing electronic products that haven't been thoroughly evaluated for their usefulness.

OBSERVATIONS AND RECOMMENDATIONS

Similar to other libraries throughout Massachusetts, the libraries of Old Colony have depended upon their network to support their automation activities over the last 30 years. The network has enjoyed success as a shared cataloging and circulation system. The ILS has provided the backbone for those activities and a thriving inter-library loan system that shares materials to provide a high level of customer services for their customers. As the Digital Revolution continues into the next phase, new challenges have arisen. Libraries are looking for direction and support as they incorporate e-resources into their services. In the survey and in the discussions Center staff had with library directors, the need to incorporate change into their libraries was unquestioned. Unfortunately, at a time when libraries need support, funding for the state Massachusetts regional systems, was greatly reduced. As a result, there are fewer state funded opportunities for training. In addition to lost training opportunities, OCLN's Executive Director and staff have been asked to serve on various committees on aspects of the inter-library loan process and state-wide e-content. This has also increased the pressure on the automated networks to at least partially fill the training gap.

OCLN has a thirty-year history of collaboration among its member libraries. The importance of this collaborative approach will continue to grow in the future. The importance of a collaborative approach to problem solving has been discussed in the report entitled *RISING TO THE CHALLENGE: Re-Envisioning Public Libraries*, by Amy Garmer, The Aspen Institute, October 2014. It is an excellent summary of the current challenges facing libraries and provides a kind of road map for achieving success. The Executive Summary of this report can be found in Appendix E. The entire report can be read at:
http://csreports.aspeninstitute.org/documents/AspenLibrariesReport.pdf

It is beyond the scope of this report to go over the entire Aspen Report, but it describes the three main assets of the library as **people**, **place**, and **platform**. David Weinberger of Harvard University is quoted in the report describing the library platform *"as an infrastructure that is as ubiquitous and persistent as the streets and sidewalks of a town, or the classrooms and yards of a university. Think of the library as coextensive with the geographic area that it serves, like a canopy, or as we say these days, like a cloud."* (p.17)

OCLN libraries have a vital and working shared platform now. This long established collaborative system can play a critical role in an environment that will increasingly envision libraries as *networked platforms* rather than *repositories of books*.

Preliminary Observations:

Center Staff observed that OCLN has built a successful collaboration over its three decades. The system has worked well in the past and it can continue to work well in the future. The

network has a Strategic Plan and Plan of Service developed that contains many of the steps needed to continue creating the platform.

These are preliminary overarching observations that are intended to provide a focal point for discussion at the September retreat. OCLN needs to:

1. Recognize that different kinds of libraries need different kinds and levels of support relative to the digital environment.
2. Recognize that the road to the digital future will be bumpy, current products will be refined and new products will come on the market.
3. Recognize that certain kinds of decisions require near universal consensus and other require only partial consensus, and define which kinds of decisions fall in each category

Once these steps are taken and documented, the implementation can take the form of both specific and general delegation of authority to the Executive Director and staff and refinements to the Strategic Plan and Plan of action.

Recommendations:

The Center team reviewed OCLN's Strategic Plan 2012-2015 and the FY2015 Plan of Service. Both documents have been well thought out and contain many necessary elements for the creation of the platform. It seems that the network libraries have enthusiastically accepted the idea of the network as platform for e-content. Using data gathered from the survey and discussions with library directors. The Center team has identified the areas of **Training, Marketing, Technical Assistance, Communications,** and **Evaluation** as areas for increased emphasis and makes the following recommendations for the network to consider:

1. **Training** – The survey and discussions expressed a need for additional training of library staff in the new products. Several libraries expressed the difficulty of having staff go to Central Site for training or meetings. One director said that the "train the trainer" concept was not working well. It was suggested that having a person from central site visit the library would be more effective. Question 3 showed that less than half of the directors have been their jobs less than five years. One of the directors said that she/he would appreciate and orientation session about network operations. Assumptions cannot be made that staff and directors in the field are on the same page in terms of their understanding of network operations. The implementation of e-content brings up many opportunities for training. While most libraries recognize the importance of these new products, they have not been universally used by patrons. Two of the libraries the team talked to indicated that their libraries were not using Zinio. Recognizing that not all training needs are being met, it is recommended that Central Site staff plan visits to member libraries for the purpose of training as well as opportunities for sessions at central site. As one director put it, the biggest thing is that *"OCLN can offer more training on products."* Another made the comment, "*I would like to see another staff member hired to handle and coordinate training."* These are just a few examples. Other

training opportunities were suggested and more will become evident as OCLN continues to make available new sources of e-content to its members.

2. **Marketing** – In addition to training, libraries expressed a need for help in marketing the eResources. Training in their use will help create visibility for these products, but there is a need to create awareness that these products are available from the library. Some libraries have made efforts in marketing and their experiences could be helpful to other libraries. A network-wide campaign would be beneficial in broadening awareness. One director made a comment that points toward a network-wide effort, "*Professional help with marketing and PR. Perhaps a legislative breakfast geared towards selectmen, town managers, mayors, councilors. Help with identifying practical trends that may be of use to patrons (i.e., Randolph's circulating Wi-Fi hot spots)."* Another director pointed out several areas for the network to consider , "*website consulting: it would be really helpful if there was a web development expert at Central Site conversant with commonly used web CMS who could assist libraries with their websites marketing/training: there is a great need for better marketing of new services (and training in how to use them) to member library staff; and also assistance for member libraries in marketing these services to the public (e.g. templates, graphic design, etc.)*"

3. **Technical Assistance** – Libraries, particularly those without technical staff expressed a need for more central site assistance in several areas. Several libraries expressed a need for help with setting up their basic network. One mentioned a problem with IP addresses in their PCs. The need for help with planning and the integration of their municipal networks with the library network is another area for consideration. One expressed the hope that OCLN staff could meet occasionally with the IT people in the town. The libraries that did have on-site staff expressed the usefulness of having recommendations on operating systems and for internal software.

4. **Communication** – As network libraries move from a print-orientation to a digital culture, there are many issues that will need planning, implementation, and evaluation. Follow-up discussions with network staff showed that they are available to visit libraries to carry out training in technical services and use of eResources. They expressed enthusiasm for a greater understanding of the needs for training in individual libraries and want to work with library staff to promote communication. Every request for more assistance is an opportunity for communication that builds upon the longstanding good will in the network. As noted earlier, directors and staff are always changing and the need to cover what may seem like old ground to some is nevertheless important for others. Communication strategies are essential in any functioning organization. OCLN libraries could develop strategies specifically tailored for improving communication between libraries and libraries and central site staff.

5. **Evaluation of e-resources** – Question 18 asked about the current level of spending by the network on shared e-content. While 14 libraries thought the amount was too low and 7 more thought it was just right, the question also generated a great deal of

comment. The visits with library directors also showed in several cases a dissatisfaction with the e-resources offered. One Academic Library offered the comment, "…these resources are not much used by our community." One director offered the opinion that the network should not be buying content but only providing the platform for the content. This overall acceptance of the need to move ahead with e-content is tempered by many questions raised about the value of the products raises questions. Eight of the 18 responses to Question 24 asking what new services could be offered, suggested increasing e-resources. On the other hand, several libraries mentioned getting little value from the services. The selection of e-content is still in its infancy. It is to be expected that not all the services will be equally successful. There needs to be extensive and continuing evaluation of how the services are being used in different libraries throughout the network.

Other observations:

1. OCLN is a diverse network. Not all libraries are ready to move in the same direction nor can they always afford to. Past practice, as well as the answers to Question 10, shows network libraries accept the principle that libraries can move at different speeds. Some decisions require a consensus of libraries. Decisions regarding the shared ILS, including the vendor, affect everyone so critically that they require a consensus. Decisions about selecting materials may be made by individual libraries that choose to make them available. Where possible, which decisions require consensus and which don't need to be clearly determined by the network.

2. Although most survey respondents said they were fine with the amount of time spent in committee meetings, some thought the committee work was often unproductive. Just as the network staff responsibilities are to be reviewed, it would make sense to review the number of committees with an eye to reducing them. For example, 15 individual committees were listed on the survey. It may be possible to have only a few standing committees with other working groups formed on an ad hoc basis.

3. The question of the role of the Executive Director in pro-actively setting direction for the network has been discussed. OCLN's bylaws in Article VIII - Executive Board state the powers of the Executive Board. Article IX – Network Operations describes the role of the Executive Director. The Executive Board has overarching authority for the network, but can also delegate its authority as it determines. The Center team sees no particular problem with the network bylaws in terms of how authority is delegated. However, changes in the way proposals are presented to the Membership can help to clarify the role of the Executive Board and Executive Director in the decision making process and strengthen the network's ability to make timely decisions.

4. Academic Libraries – In discussions with the academic library directors, it was expressed that the e-resources chosen so far were unsuited to the needs of their clientele. Students need different data bases than the general public. If OCLN is going to continue

to be an attractive option for academic libraries, attention needs to be given to their needs. In answer to Question 25, an academic library suggested, "*Management of electronic resources continues to grow in size and complexity. This is an area where the academics need more service which if done correctly offsets the other services from which we really don't benefit.*"

Summary

In general, the Center staff found that the network has much to be proud of. During its 31-year history, 29 collaborating libraries have coalesced in a well-functioning automated cataloging and circulation system that promotes efficient resource sharing. It has continued to adapt as the needs of library users have changed and now provides a selection of eResources available to patrons throughout the network. With the continued hard work of its member libraries and central site staff, OCLN will continue to thrive.

Appendix A – MBLC Staff, Library Directors, and Library Staff Interviewed

Massachusetts Board of Library Commissioners (MBLC) Staff interviewed:

Dianne L. Carty, Director

Cynthia A. Roach, Head of Library Advisory & Development

Paul Kissman, Library Information Systems Specialist

Library Directors interviewed in their libraries:

Karen Johnson, Avon Public Library

Meaghan Thompson, Turner Free Library, Randolph

Andrea Rounds, Whitman Public Library

Will Adamczyk, Milton Public Library

Susan Whitehead, Quincy College Library

Keith Choquette, Acting Director, Brockton Public Library

Rebecca Freer, Norwell Public Library

Library Directors interviewed by telephone:

Dinah O'Brien, Plymouth Public Library

Jackie Rafferty, Paul Pratt Memorial Library, Cohasset

Lorraine Welsh, John Curtis Free Library, Hanover

Lee Ann Amend, Sharon Public Library

Joanne Lamothe, Sandwich Public Library

Mark Lague, Canton Public Library

OCLN Staff interviewed:

David Slater, Executive Director

Nancy Jo Brown, Database Manager

Christina Brodeur, User Services Librarian

Appendix B – Background on Collins Center and Project Team

The Collins Center was created by the legislature in 2008 to provide UMass Boston with a vehicle for consulting with municipalities and state agencies. Since its founding, it has completed well over two hundred consulting engagements. More comprehensive information is available at http://www.umb.edu/cpm

Richard Kobayashi leads the center's executive recruitment practice and contributes to other Center based management consulting projects. Kobayashi served for over a decade as director of the Commonwealth's technical assistance programs for municipalities, as aide to the mayor in Malden, as director of planning and development in Lawrence, as a staff member of the Community Development Department in Cambridge, and as a senior planner at the MWRA. He created the Commonwealth's Incentive Aid program, which professionalized over one hundred municipal positions and while in Lawrence authored the Lawrence Plan, a comprehensive plan for physical and social development. He has also served as an elected official in his hometown of Belmont. Kobayashi worked as an independent consultant from 1995 to 2004 serving municipalities in the US. The former Soviet Union and Eastern Europe. Kobayashi was a Loeb Fellow at Harvard University where he studied urban policy. He has a Master of Public Administration from Northeastern University and a Bachelor of Arts in Economics from the University of Massachusetts Amherst.

James Sutton began his association with the center in 2014 to work on a White Paper about the *State Aid to Public Libraries* program administered by the Massachusetts Board of Library Commissioners (MBLC). Sutton was director of Natick's Morse Institute Library from 1979-1993 and Andover's Memorial Hall Library from 1993-2009. He has served and been an officer in many network and statewide committees including serving as president of the Minuteman Library Network and Merrimack Valley Library Consortium. He is a Past-President of the Massachusetts Library Association. Currently, he is the Membership Chair of the Friends of Memorial Hall Library as well as serving on the boards of other community educational, historical, and conservation groups. In the mid-1970s, he was the Young Adult Librarian at the Stoughton Public Library. Sutton holds a Masters Degree in Library Science from Simmons and an undergraduate degree from Dartmouth.

Appendix C1 – OCLN DATA

Data from MBLC Public Library Statistics Summary						
FY 2014						
Location	**Municipal.**	**Pop**	**Tot. Hold.**	**Total Circ**	**NonRes Circ.**	**# Borrowers**
Abington Public Library	Abington	16,060	76,256	119,609	21,330	6,945
Avon Public Library	Avon	4,386	63,737	39,398	11,779	2,435
Thayer Public Library	Braintree	36,249	140,213	448,989	83,645	17,663
Brockton Public Library System	Brockton	94,094	374,713	262,543	8,911	33,269
Canton Public Library	Canton	21,932	309,009	301,191	41,102	11,561
Paul Pratt Memorial Library	Cohasset	8,195	222,020	174,242	31,362	5,058
Duxbury Free Library	Duxbury	15,172	112,783	251,242	38,174	9,679
John Curtis Free Library	Hanover	14,151	92,716	128,191	18,662	6,616
Hingham Public Library	Hingham	22,520	193,240	436,120	101,262	13,988
Holbrook Public Library	Holbrook	10,899	52,547	64,351	9,738	4,398
Hull Public Library	Hull	10,302	38,487	43,747	5,942	4,039
Kingston Public Library	Kingston	12,727	104,383	126,505	25,125	5,743
Ventress Memorial Library	Marshfield	25,436	88,944	211,679	18,403	11,544
Massasoit						
Milton Public Library	Milton	27,158	127,689	344,997	44,625	18,271
Nease						
Norwell Public Library	Norwell	10,574	205,124	150,874	27,060	5,260
Plymouth Public Library	Plymouth	57,463	291,618	400,129	30,727	25,442
Quincy College						
Thomas Crane Public Library	Quincy	93,027	316,777	840,494	76,686	36,996
Turner Free Library	Randolph	33,226	85,954	286,159	30,116	14,176
Rockland Memorial Library	Rockland	17,580	65,471	88,772	12,654	6,494
Sandwich Free Public Library	Sandwich	20,662	88,448	244,519	30,212	12,894
Scituate Town Library	Scituate	18,173	93,763	265,859	23,246	10,084
Sharon Public Library	Sharon	17,826	91,350	286,927	18,974	9,733
Stoughton Public Library	Stoughton	27,849	113,877	177,126	20,506	11,050
Walpole Public Library	Walpole	24,562	104,201	255,376	15,412	12,235
Tufts Library	Weymouth	54,906	151,278	358,040	49,148	18,965
Whitman Public Library	Whitman	14,609	61,480	101,711	14,885	7,481
		709,738	**3,666,078**	**6,408,790**	**809,686**	**322,019**

Appendix C2 – MVLC DATA

Data from MBLC Public Library Statistics Summary						
FY 2014						
Location	Municipal.	Pop	Tot. Hold.	Total Circ	NonRes Circ.	# Borrowers
Amesbury Public Library	Amesbury	16,535	73,695	186,612	16,835	11,771
Memorial Hall Library	Andover	34,142	229,103	670,499	112,882	29,747
Billerica Public Library	Billerica	41,454	146,474	316,392	18,640	18,640
Boxford Public Library	Boxford	8,087	46,884	67,418	5,116	6,115
Burlington Public Library	Burlington	25,165	113,487	349,993	70,363	20,108
Gleason Public Library	Carlisle	4,978	64,114	118,878	12,672	5,598
Chelmsford Public Library	Chelmsford	34,545	146,976	545,490	105,347	24,313
Moses Greeley Parker Memorial Library	Dracut	30,220	101,581	266,194	71,944	18,089
Dunstable Free Public Library	Dunstable	3,303	37,518	21,556	1,640	1,988
T.O.H.P. Burnham Free Library	Essex	3,584	23,330	35,235	1,147	2,413
Peabody Library	Georgetown	8,377	65,489	90,410	9,969	5,331
Groton Public Library	Groton	11,017	95,602	227,184	48,272	12,974
Langley Adams Library	Groveland	6,794	47,726	73,592	11,566	4,193
Hamilton-Wenham Public Library	Hamilton	13,065	134,667	289,732	57,918	12,747
Haverhill Public Library	Haverhill	61,797	198,899	408,505	33,216	41,775
Ipswich Public Library	Ipswich	13,545	114,485	189,301	10,363	10,768
Lawrence Public Library	Lawrence	77,326	205,186	127,340	8,155	30,432
Reuben Hoar Library	Littleton	9,132	93,432	180,048	25,365	7,731
Samuel S. Pollard Memorial Library	Lowell	108,522	252,467	225,939	12,128	54,002

Library	Town					
Manchester-by-the-Sea Public Library	Manchester-by-the-Sea	5,216	60,342	81,229	8,326	5,467
Merrimac Public Library	Merrimac	6,517	54,793	78,365	14,991	4,836
Nevins Memorial Library	Methuen	48,009	140,380	262,569	26,327	27,052
Flint Public Library	Middleton	9,267	120,224	87,546	13,459	4,997
Newbury Town Library	Newbury	6,771	65,089	61,017	13,324	4,473
Newburyport Public Library	Newburyport	17,654	127,043	347,231	75,391	16,866
Stevens Memorial Library	North Andover	28,422	109,260	229,396	17,879	20,143
Flint Memorial Library	North Reading	15,254	77,125	118,865	5,397	9,532
Rockport Public Library	Rockport	7,063	65,339	89,761	8,634	6,666
Rowley Public Library	Rowley	5,966	51,539	58,518	8,941	3,229
Salisbury Public Library	Salisbury	8,425	41,976	28,665	3,192	4,213
Tewksbury Public Library	Tewksbury	29,669	226,104	266,385	38,129	20,013
Topsfield Town Library	Topsfield	6,273	96,158	145,508	40,069	5,732
Tyngsborough Public Library	Tyngsborough	11,953	72,435	120,796	17,026	7,418
G. A. R. Memorial Library	West Newbury	4,367	60,569	114,203	25,300	3,127
J. V. Fletcher Library	Westford	22,851	145,111	313,560	24,875	17,106
Wilmington Memorial Library	Wilmington	21,578	61,475	239,627	21,407	15,416
		766,843	**3,766,077**	**7,033,559**	**996,205**	**495,021**

Appendix D – MEMBER SERVICES PROVIDED AS OF JUNE 30, 2014 (MBLC REPORT)

Report Provided by the Massachusetts Board of Library Commissioners

NET-WORK	Wireless Access Support		Information & Referral Databases	Digital Archiving Services	Library Home Page Hosting	Centralized PC Mgmt.	On-site PC support	On-site Advising/ Consulting	Continuing Education		Time & Print Mgmt.
	Library PCs	Patron PCs							# of Sessions	# of Attendees	
CLAMS							YES	YES	17	181	
C/W MARS	89	48		36			YES	YES	93	801	YES
FLO				5					11	21	
MBLN	3	3						56	0	0	
MLN			23				43	43	22	421	
MVLC					2	36	22	36	36	216	YES
NOBLE				11	18		14	YES	26	470	YES
OCLN									50	114	
SAILS				14	5		35	YES	72	229	27
									327	2,453	

| NET-WORK | Database Licenses | | | | eBooks § | | | | | | | Linking | | |
| | Total Number of Data-bases | | "In-library Only" data-bases | | Shared eBook collections | | | Added in FY2014 | | | Member exclusive pur-chases | | | |
	Networkwide	Individual	Networkwide	Individual	Y / N	Total Titles	Total Copies	Titles Added	Copies Added	Y / N	# of Lib-raries	OPAC to Online Jour-nals	On-line to OPAC	Cata-loging
CLAMS	3	0	0	0	Y	25,032	27,420	3,749	4,819	Y	28	Y	N	Y
C/W MARS	4	0	0	0	Y	20,082	22,965	9,870	11,446	Y	8	Y	N	Y
FLO	1	110	0	0	Y	210,196	210,196	123,450	123,450	N	0	Y	Y	N
MBLN*	0	0	0	0	N	0	0	0	0	N	0	Y	Y	Y
MLN	4	6	0	1	Y	39,669	46,680	3,085	4,862	Y	32	Y	Y	Y
MVLC	7	0	1	0	Y	7,365	8,481	431	652	N	0	Y	Y	Y
NOBLE	13	43	0	0	Y	8,421	10,248	1,789	2,286	N	0	N	N	Y
OCLN	3	0	0	0	Y	6,445	16,745	2,489	3,578	Y	18	Y	Y	Y
SAILS	2	0	0	0	Y	52,055	54,173	2,066	2,638	Y	21	Y	N	Y
TOTAL	37	159	1	1		369,265	396,908	146,929	153,731		107			

*BPL licensed databases and e-content were reported here in previous years. MBLN is not involved in licensing content.

§ Does not include eAudiobooks

Appendix E – EXECUTIVE SUMMARY FROM *RISING TO THE CHALLENGE: RE-ENVISIONING PUBLIC LIBRARIES*, A REPORT OF THE ASPEN INSTITUTE DIALOGUE ON PUBLIC LIBRARIES, BY AMY K. GARMER, DIRECTOR

The following Executive Summary is from the publication Rising to the Challenge: Re-Envisioning Public Libraries, A Report of the Aspen Institute Dialogue on Public Libraries, by Amy K. Garmer, Director, The Aspen Institute, October 2014.

Expanding access to education, learning opportunities and social connections for all is one of the great challenges of our time. It is a challenge made more urgent by the rapid transition from old industrial and service-based economic models to a new economy in which knowledge and creativity are the drivers of productivity and economic growth, and information, technology and learning are central to economic performance and prosperity.

It is not only the economy but all of society that is being reshaped by these trends. Amid these changes, there are divides in wealth, digital inclusion and participation that threaten to widen if we as a nation do not commit to new thinking and aggressive action to provide these opportunities for all.

This is a time of great opportunity for communities, institutions and individuals who are willing to champion new thinking and nurture new relationships. It is a time of particular opportunity for public libraries with their unique stature as trusted community hubs and repositories of knowledge and information.

THE PUBLIC LIBRARY IN THE DIGITAL AGE

Libraries are essential to success and progress in the digital age.

The process of re-envisioning public libraries to maximize their impact reflects:

Principles that have always been at the center of the public library's mission—equity, access, opportunity, openness and participation

The library's capacity to drive opportunity and success in today's knowledge-based society

An emerging model of networked libraries that promotes economies of scale and broadens the library's resource reach while preserving its local presence

The library's fundamental people, place and platform assets

The Dialogue's perspective on the 21st-century library builds on the public library's proven track record in strengthening communities and calls for libraries to be centers of learning, creativity and innovation in the digital age. No longer a nice-to-have amenity, the public library is a key partner in sustaining the educational, economic and civic health of the community during a time of dramatic change. Public libraries inspire learning and empower people of all ages. They promote a better trained and educated workforce. They ensure equitable access and provide important civic space for advancing democracy and the common good. Public libraries are engines of development within their communities.

PUBLIC LIBRARIES AT THE CENTER OF THE DIGITAL AGE

Public libraries are poised to play a leading role in helping individuals and communities adapt to this changing world. Many libraries already are linking individuals to information and learning opportunities, driving development and innovation, and serving as community connectors. With nearly 9,000 public library systems and 17,000 library branches and outlets across the country, there is already a significant physical presence and infrastructure to leverage for long-term success.

Enabling all libraries to fulfill their new roles will require library leaders, policy makers and community stakeholders to re-envision the public library and take advantage of the opportunities it offers.

PEOPLE, PLACE AND PLATFORM

The emerging value proposition of the public library is built around three key assets— people, place and platform:

PEOPLE. The public library is a hub of civic engagement, fostering new relationships and strengthening the human capital of the community. Librarians are actively engaged in the community. They connect individuals to a vast array of local and national resources and serve as neutral conveners to foster civic health. They facilitate learning and creation for children and adults alike.

PLACE. The public library is a welcoming space for a wide range of purposes—reading, communicating, learning, playing, meeting and getting business done. Its design recognizes that people are not merely consumers of content but creators and citizens as well. Its physical presence provides an anchor for economic development and neighborhood revitalization, and helps to strengthen social bonds and community identity. The library is also a virtual space where individuals can gain access to information, resources and all the rich experiences the library offers. In the creative design of its physical and virtual spaces the public library defines what makes a great public space.

PLATFORM. The public library is user-centered. It provides opportunities for individuals and the community to gain access to a variety of tools and resources with which to discover and create new knowledge. The platform enables the curation and sharing of the community's knowledge and innovation. A great library platform is a "third place" —an interactive entity that can facilitate many people operating individually and in groups—and supports the learning and civic needs of the community.

STRATEGIES FOR SUCCESS

The Dialogue concludes that the long-term health of libraries is essential to the long-term health of the communities they serve and identified four strategic opportunities for action to guide the continuing transformation.

1. ALIGNING LIBRARY SERVICES IN SUPPORT OF COMMUNITY GOALS

Public libraries that align their people, place and platform assets and create services that prioritize and support local community goals will find the greatest opportunities for success in the years ahead. Managers of local governments report that it is often difficult to prioritize libraries over other community services such as museums or parks and recreation departments that also serve a distinctly public mission. What libraries need is to be more intentional in the ways that they deploy resources in the community, and more deeply embedded in addressing the critical challenges facing the community. This will require a level of flexibility and adaptability to change as community needs change. It will also require collaboration among libraries, policy makers and community partners to redefine the role of

libraries as institutions that inspire learning, drive development, grow social capital and create opportunities.

2. PROVIDING ACCESS TO CONTENT IN ALL FORMATS

As the public library shifts from a repository for materials to a platform for learning and participation, its ability to provide access to vast amounts of content in all formats is vital. Libraries face two immediate major challenges in providing access to content in all forms:

Being able to procure and share ebooks and other digital content on the same basis as physical versions

Having affordable, universal broadband technologies that deliver and help create content

Dealing with both challenges have been high priorities for public libraries throughout the country. The challenges have been particularly acute for small libraries, those in rural communities and in some urban areas where limited budgets make access to ebooks and upgrades to high-speed broadband difficult despite high community need for and interest in both. Ensuring access to ebooks, other e-content and more-than-adequate high-speed broadband is a big concern going forward because it impacts the public library's ability to fulfill one of its core missions—to procure and share the leading ideas of the day and enable everyone to participate in the world's conversations.

3. ENSURING THE LONG-TERM SUSTAINABILITY OF PUBLIC LIBRARIES

Perhaps the greatest challenge facing public libraries today is to transform their service model to meet the demands of the knowledge society while securing a sustainable funding base for the future. With limited and sometimes volatile funding, however, such transformations will be uneven and incomplete. In addition, the highly local nature of public library funding and governance structures may interfere with both rapid and broad-scale progress—the kind of scale needed to compete and thrive in a world of global networks. Challenges that shape the discussion about long-term public library sustainability given their vital role in the digital era include:

Identifying reliable sources of revenue for daily operations as well as long-term planning and investment

Exploring alternative governance structures and business models that maximize efficient and sustainable library operations and customer service

Becoming more skilled at measuring outcomes rather than counting activities

Balancing the local and national library value proposition to consider economies of scale in a networked world without compromising local control

4. CULTIVATING LEADERSHIP

Leadership is needed across the community—from elected officials, government leaders, business and civic leaders and libraries themselves—to build communities and public libraries that thrive and succeed together. Vision is a critical component of leadership. Every community needs a vision and a strategic plan for how to work with the public library to directly align the library and its work with the community's educational, economic and other key goals. It must have input from all stakeholder groups in the community. Key steps in building community leadership to support the public library include improving communications with community leaders, developing community champions, strengthening intersections with diverse communities and communities of color, reaching out to and engaging with young-professional organizations and demonstrating the collective impact of partners working together.