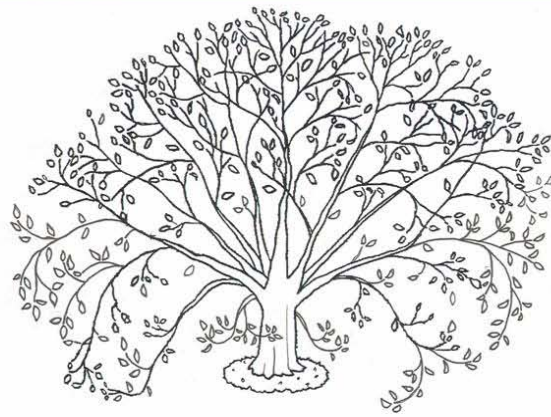


Sherborn Library



A branch
to the future

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Massachusetts Board of Library Commissioners
98 North Washington Street – Suite 401
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September 26, 2006

Dear Library Commissioners and MBLC staff:

The Sherborn Library Board of Trustees and Library Director are pleased to submit to you for your review the Library's long-range plan "The Sherborn Library: A Branch to the Future 2006-2011."

The Sherborn Library was built 35 years ago and an intensive planning and fund-raising process was begun in 2005 to renovate or enlarge the facility. Many of the aspects of the enclosed long-range plan are related to this major capital project. In addition to the general long-range plan 2006-2011, the Library Planning Committee has been working on an assessment of the facility and space projections for the future. We have coordinated our planning process to qualify the Sherborn Library to apply for state grants that help achieve the stated goals, and to participate in the FY2007 grant round that supports the MPLCP Planning and Design program.

The plan was unanimously approved by the Trustees at their meeting of May 16, 2006. We welcome and seek your remarks and approval to proceed to implement the long-range plan.

Respectfully submitted,

Elizabeth Johnston
Library Director

Town Brief History

BRIEF HISTORY OF SHERBORN, MASS.

Sherborn is a small, semi-rural town (pop. 4,500) located about 18 miles west of Boston. Primarily a farming community until the early part of this century, it now is a bedroom town for Boston and the surrounding hi-tech area.

Indians

Little is known about the local Indians. There appear to have been permanent settlements, for the earliest deed of one area refers to the "old fields"; and various implements have been both plowed up and found at Rocky Narrows and near Farm Pond. However, even the name of the tribe is uncertain, for Sherborn seems to have been at the interface between the Massachusetts and the Nipmuck tribes. Several Indians kept land in town after its incorporation (e.g. Peter Ephriam on Brush Hill and Thomas Awussamoag); they appear to have been connected with the Natick "Praying Indian" community.

English Settlement

The whole Charles River valley from South Natick to the falls at Medway kept its Indian name "Boggestow"; it was sought out by the English because of the abundant marsh grass growing on the wide flood plain. The earliest Sherborn land owned by the English took the form of large (200-1074 acres) grants called "farmes" made by the General Court beginning in the 1640's to individuals for payment of services rendered to the colony. These owners later sold acreage to settlers, the first resale being to Thomas Holbrook, and Nicholas Wood in 1652. They and successive settlers bought those wilderness lands and lived there while retaining their citizenship in the nearest incorporated town: Medfield.

Town

By 1674 Boggestow had grown sufficiently to be incorporated as a new town (i.e. the land had never been part of another town) and was arbitrarily named "Sherborne" by the General Court. The original area was of such an awkward shape that the General Court allowed an exchange of 4000 acres with the Natick Indians in 1679; and it was that new land which formed most of the present town.

In the decade after King Phillips War (1675-6) Sherborn settlers organized the local government and drew up a Social Covenant, paid the Indians for land title, attracted a saw miller, built a Meeting House and called the first minister, and granted home lots throughout most of the present town. In the second decade they formed a town militia company, hired a schoolmaster, and acquired a gristmill. Thus by 1700 they had become an "established" town.

General Development

Throughout the 1600's, 1700's, 1800's Sherborn remained a small and relatively self-sufficient farming community. Little industry developed because of the lack of good water power, although there continued to be saw and gristmills on several of the small, intermittent streams. However, apples grew well, and there were always small cider mills. With the coming of both the railroad and steam power one mill developed further, until by the 1890's it was advertised as the "largest refined cider mill in the world". At that time it pressed over 1.25 million gallons of cider per season and exported "Champagne" cider as far west as Nebraska and Texas and as far East as England and Belgium.

In the late 1700's and early 1800's several small cottage industries developed, particularly along North Main Street. They produced guns, shoes, willow baskets, whips, pitchforks and edge tools. Cranberries became an important crop, as well as mixed farming and dairying. Crops and crafts were sold in the Boston markets via stagecoach and later railroad.

The early Twentieth Century saw several new trends. In the early 1900's several wealthy families moved into different parts of town and built estates for either year-round or summer use. Those remaining today are located primarily along the Charles River - The area of first settlement. Dairy and poultry raising increased in importance, as did service related jobs.

Following World War II the town began to change rapidly from one with a relatively static population (c. 1500) to a growing and transient one. Developments were built in 1-, 2-, and 3-acre zones. The disappearance of family farms accelerated as the town became increasingly suburban; today estate-farms form most of the few farms which remain. There is still considerable open space. The town is trying hard to retain its rural character; but that is increasingly difficult as land prices and taxes escalate.

Houses

Because the town was relatively poor in the late 1800's and early 1900's few people "modernized" their old houses by tearing them down and rebuilding. As a result many of the houses built in 1700's and early 1800's remain, as well as six or more with late 1600's portions. Two National Register Historic Districts have been established to include the old Town Center and a two-mile strip along North Main Street; and scattered individual houses have also been listed: a total of 77 old houses. A very small Town Historic District also exists in the old Town Center.

Government

The town is governed by a combination of elected and appointed volunteers and a few key salaried officials. Since town government was set up c. 1678 it has been run by the Selectmen (3 at present) and the traditional open Town Meeting, at which all citizens vote annually on major expenditures and policies. There is no industry zoned in the town. Property taxes support town government and services. Public services are minimal and homeowners rely on individual wells and septic systems. There are a full full-time Police Force and Highway Dept. and both a

volunteer "call" Fire Dept. and a rescue Squad, all highly trained. The town has three churches and a modern public library. The schools are small and excellent; the elementary school is local, whereas the junior and senior high schools are regionalized with Dover, a similar town across the Charles River. Town Boards and other organizations depend almost entirely upon volunteer participation, as they have for over three hundred years.

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Sherborn Library History

(This page reserved for Town Historian Betsy Johnson's & Library Director Elizabeth Johnston's Library history.)

PLANNING METHODOLOGY

In 2003, the Sherborn Library Board of Trustees established an ad hoc planning subcommittee that would gather the recommendations and goals set by the following Trustee Subcommittees:

- Personnel
- Finance
- Technology
- Building

The President of the Friends of the Library and Library Director also served as members of the Planning Subcommittee. Staff were polled for insights and to gather information about services based on their working experiences.

The Planning Subcommittee prepared and mailed a Town-wide survey to all Sherborn Households in 2004. The Library received an 18% response, which was considered remarkably high for surveys of this kind. The results of the survey were tabulated and arranged in PowerPoint. The survey results were presented in PowerPoint at several public meetings: to the full Board of Library Trustees, the Library staff and volunteers, and to the Board of Selectmen. The presentations were impressively received.

From this community input, the Planning Subcommittee worked to write a multi-year general plan for the Library, using the patterns detected from the survey and open-ended comments and organizing them within in the assertions of the Library's mission statement. The exercise resulted in this five-year plan we entitled The Sherborn Library: A Branch to the Future 2006-2011. In addition to the general plan, the subcommittee also drafted a separate, comprehensive building assessment document. The plans were accepted by the Board of Library Trustees at their May 2006 meeting.

Resources used as planning guides were the Public Library Association Planning for Results; The Wisconsin Study; and the LSTA Plan 2003-2007 for Massachusetts. Resources consulted for the community analysis and demographic profile were: Town of Sherborn Master Plan; the Town Annual Reports; Metropolitan Area Planning Council, MAPC, historical and forecast data; Mass. Executive Office of Environmental Affairs, EOE, buildout forecast; and the US Census data. Permission to reprint "A Brief History of Sherborn" was given to the Committee by Town Historian Betsy Johnson. The Committee also visited a number of newly constructed or recently renovated public libraries to observe services in action in state-of-the-art surroundings.

Pending the approval of the Massachusetts Board of Library Commissioners of A Branch to the Future, the Library will catalog a copy for public viewing and scan it as a website link. The Sherborn Library's website is located at home.comcast.net/~sherbornlibrary.

Demographic Analysis and Projections

This report considers Sherborn's historical growth patterns and provides a town growth projection for purposes of determining the library facilities needed to satisfy demand in 2025.

Sources used in this analysis include:

- Town annual reports
- The Sherborn General Plan
- Metropolitan Area Planning Council, MAPC, historical and forecast data
- Mass. Executive Office of Environmental Affairs, EOE, buildout forecast
- US Census data

Annual Town Reports - Sherborn population from annual reports:

<u>Annual Report for year</u>	<u>Population</u>	<u>New Housing Permits</u>	<u>Demolitions</u>	<u>Occupancy Permits</u>	<u>New Septics</u>
1986	4509 on 1/1/1986	11	17	12	n/a
1988	4369 on 1/1/1988	6	13	10	n/a
1989	4315 on 1/1/1989	6	3	6	n/a
1990	4286 on 1/1/1990	2	2	10	n/a
1991	4252 on 1/1/1991	5	5	8	n/a
1992	4263 on 1/1/1992	18	5	16	33
1993	4281 on 1/1/1993	17	1	26	19
1994	4317 on 1/1/1994	20	3	26	16
1995	4352 on 1/1/1995	8	1	18	25
1996	4380 on 1/1/1996	7	3	18	3
1997	4372 on 1/1/1997	7	4	8	7
1998	4417 on 1/1/1998	7	2	11	4
1999	4442 on 1/1/1999	28	2	14	9
2000	4472 on 1/1/2001	6	3	18	5
2001	4490 on 12/31/2001	6	2	9	6
2002	4545 on 12/31/2002	3	2	6	3
2003	4552 on 12/31/2003*	8	5	8	7
2004	4552 on 12/31/2004*	10	9	14	13

Notes:

- The bulge in 1992 - 1993 is due to the Cider Hill Lane development.
- The 28 permits in 1999 include 17 units due to the Leland Farms Affordable Housing project
- The 3 permits in 2002 includes one senior living complex of 24 units
- The 8 permits in 2003 include replacement of 4 existing houses.
- The 10 permits in 2004 include replacement of 4 existing houses
- Demolitions include all structures, not just houses
- *This is not an error – the population did not change between 2003 & 2004

MAPC Data and Forecasts

MAPC forecast data for Sherborn was obtained from the MAPC website at: <http://www.mapc.org>. The methodology used by the MAPC is provided on their website in "2003ForecastsReport.pdf"

Household Data and Forecast

The MAPC Community Historical Household and Forecast data (as of March 17, 2003) for Sherborn is:

<u>1970</u>	<u>1980</u>	<u>1990</u>	<u>2000</u>	<u>2005</u>	<u>2010</u>	<u>2015</u>	<u>2020</u>	<u>2025</u>
873	1,202	1,349	1,423	1,445	1,464	1,434	1,330	1,364

The MAPC projection of a decrease of 59 household units from 2000 to 2025 is not consistent with Sherborn's historic growth pattern.

Population Data and Forecast

The MAPC historical and forecast (March 17, 2003) population data by age group for Sherborn is:

<u>Age</u>	<u>1970</u>	<u>1980</u>	<u>1990</u>	<u>2000</u>	<u>2005</u>	<u>2010</u>	<u>2015</u>	<u>2020</u>	<u>2025</u>
0- 4	303	231	269	317	238	142	111	149	233
5- 9	421	358	285	391	486	365	219	170	170
10-14	471	479	284	408	463	577	433	259	259
15-19	296	462	289	278	385	438	546	410	410
20-24	106	195	245	80	192	268	305	380	380
25-29	127	111	176	65	52	125	174	198	198
30-34	196	346	199	135	91	72	175	244	244
35-39	565	731	318	345	188	127	101	246	246
40-44		444	417	502	275	186	149	149	
45-49	400	633	384	418	429	528	289	196	196
50-54		324	416	399	419	515	282	283	
55-59	121	160	259	260	328	335	353	434	436
60-64	107	115	179	196	147	280	346	190	191
65-69	123	118	131	162	134	117	224	276	278
70-74		77	112	114	109	96	183	185	
75-79	73	110	59	102	41	68	66	58	58
80-84		42	48	37	24	41	39	40	
85+		25	50	36	44	41	49	50	
Total	3,309	4,049	3,989	4,200	4,262	4,314	4,220	3,912	4,007

The data for 1970 to 2000 is the same as the US Census data. The forecast data for 2005 to 2025 was published on March 17, 2003. Note that the totals for 2010, 2015, and 2025 do not add up to the indicated total for the column, probably due to rounding errors. The methodology for the forecast data is not known but is probably based upon demographic projections for the Metrowest area. In the census data for 1970 and 1980 the data in the 35-39 age group actually covers ages 35-44; the data for 45-49 covers ages 45-54; the data for 65-69 covers ages 65-74; and the data indicated for 75-79 covers 75+.

US Census Data

Household Data:

<u>1980</u>	<u>1990</u>	<u>2000</u>
1,202	1,349	1,423

Population Data

US Census population data for Sherborn for 1970, 1980, 1990, and 2000 is the same as in the MAPC table above.

Buildout Analysis

Buildout analyses have been done by the Sherborn Planning Board, and by the MAPC for the Executive Office of Environmental Affairs, EOEA.

The Sherborn buildout analysis is reported in the Sherborn General Plan, October 3, 2001, and shows that the town has the potential for an additional 1262 house lots that would result in an additional population of 3786 residents. This would result in a total of 2734 homes and 8258 residents at buildout based upon the 1472 housing units and 4472 residents indicated in the 2000 town census.

The EOEA buildout analysis projects a total of 3079 homes and 8741 residents at buildout based upon the 1451 housing units and 4200 residents indicated in the 2000 US Census.

Note that the town census and US census use different methodologies for determining population count. One principal difference is that the town census includes students who are away at school while the US census counts them as residents of the place in which they live while going to school.

The Sherborn buildout analysis is based upon existing town zoning bylaws and environmental (wetlands) regulations. The State Chapter 40B affordable housing law permits a much greater density of housing than can be accommodated by the town bylaws. As of this date one Ch. 40B affordable housing project is proposed in Sherborn and is in the process of obtaining approval. This project would place 48 units of housing in a 36 acre parcel which would otherwise accommodate approximately six homes under current town bylaws and regulations.

Analysis and Conclusions

The growth rate of single family homes in Sherborn in the 1990's is slightly over 10 homes per year. This is due to a "background" growth of about 6.5 homes per year plus the extra-ordinary events of the Cider Hill Lane development (20 homes), and the Leland Farms affordable housing development (17 townhouse units). During this period of time an assisted care facility was proposed but later withdrawn.

The buildout analysis by Sherborn (1262 additional homes), and the EOEA (1628 additional homes) indicates that buildout will not be reached for 126 - 162 years at the current average building rate of 10 per year. Consequently, the growth in the number of Sherborn homes will not be affected by buildout limitations in the next two decades.

Currently, an elderly housing development of 24 units has been recently completed on Kendall Ave. of which 18 are unsold as of 12/31/2005. An MGL Ch 40B affordable housing project for 48 town house units is in the planning/permitting stage. This 48-unit project has not been approved by the Sherborn Zoning Board of Appeals and has been appealed to the Mass Housing Appeals Committee by the developer. An earlier 32 unit proposal was approved by the ZBA with conditions which were not acceptable to the developer. Eventually a project in the

range of 32-48 units is expected to be constructed. For purposes of this analysis a 48-unit project is assumed.

A background building rate of 6 homes per year is assumed out to and beyond the year 2025.

For planning purposes additional affordable housing projects totaling 40 units, and elderly housing projects totaling 60 units are assumed to be added to Sherborn's housing by the year 2025. The additional elderly and affordable housing projects are in accordance with the housing goals outlined in the Sherborn General Plan.

The resulting 88 Ch 40B units are assumed to be townhouses with occupancy of 3 persons per unit. The 81 elderly housing units (21 remaining unsold units plus the 60 additional units) are assumed to have occupancy of 2 persons per unit. The remaining 6 x 21 = 126 traditional single-family residences are assumed to have occupancy of 3 persons per home. This results in a population increase of 792 in the Sherborn population by the end of year 2025, bringing the total population of the community to 5344 at that time based on the town population of 4552 at the end of 2005. This represents an increase of 17.4% for the 20-year period or an annual growth rate of 0.81%.

By this analysis the Sherborn library should plan to provide for services to a town population in 2025 that is approximately 17% greater than that served in 2004.

The age distribution forecast for 2000 and 2025 by the MAPC was applied to the town based totals for 2000 and 2025 and are summarized in the following table:

<u>age</u>	<u>2000</u>	<u>2025</u>
0-4	338	311
5-18	1,028	900
19-64	2,601	3,318
65+	<u>505</u>	<u>815</u>
	4,472	5,344

This table indicates that there will be a reduction in the number of pre-school and school age populations, a 28% increase in the adult working population, and a 61% increase in the number of seniors, compared to the demographics in the year 2000.

The MAPC methodology for determining the population and household forecasts are described in file "2003ForecastsReport.pdf" on the MAPC website. This methodology is an appropriate but general approach that is applied to each of the communities in the MAPC area. It does not, however, take into consideration the specific current and proposed building projects that affect population and household forecasts in the near future. It also does not take into consideration the community attitudes, such as expressed in the Sherborn General Plan, favoring the construction of elderly housing units during this period so that the Sherborn elderly populations can continue to live in the community after retirement. For these community-specific reasons the population forecast in this section is felt to be the appropriate model for the library space evaluation.

Bibliography and References

- Sherborn Annual Reports for 1986, 1988, 1989, and 1991 to 2004
- Town of Sherborn General Plan, October 3, 2001
- Metropolitan Area Planning Council website, <http://www.mapc.org>
- Massachusetts EOE website, <http://commpres.env.state.ma.us/community/>
- 2003ForcastsReport.pdf at <http://www.mapc.org>

Library Community Analysis - MetroWest Comparable Towns

In 2001, the Town of Sherborn hired a consultant from the Massachusetts Municipal Association to help identify competitive salaries for the non-union positions. Ten area towns were examined for this study. In the effort to stay consistent with the Town's idea of a viable gauge to utilize for meeting standards, the Trustees' Planning Committee examined the same ten towns to compare library budgets and activity levels.

It is reasonable to compare ourselves to these towns not only to stay consistent with a Town-validated measure, but also because many of these are our neighboring towns, or are towns inhabited by a similar demographic profile of people or local economic conditions. We are not intending to display the competitive edges of these towns by arranging a comparable spreadsheet - libraries are not competitive organizations generally, but none enjoy the thought of a neighboring resource-rich library absorbing or attracting away its resident population under the auspices of the open library system, or luring its personnel because of higher pay and better benefits. Rather, the purpose of the comparable spreadsheet is to (1) complete the recommendations of the Public Library Planning Process reach a greater understanding of the local library using an objective measure (2) to communicate and expose locally the strengths and challenges of the Sherborn Library, as compared to the data of similar towns, and present contrasts that spark discussion to win support for the Library's endeavors.

The data used on the charts for the numerous towns in Massachusetts belonging to Sherborn's population group of 2,000 – 4,999 is from FY2004. The data used for the neighboring and comparable MetroWest towns to which Sherborn compares itself is from FY2005. The scale of the town populations in the exhibit range from Sherborn (pop. 4,230) on the small end to Natick (pop. 30,507) on the large end. Towns in the population mid-range of the list include Holliston (pop. 13,919) and Medfield (pop. 12,397.) Based on the responses and comments of the 2004 Town-wide survey, there is evidence that the citizens of Sherborn visit Natick, Medfield, and Holliston libraries in addition to the Sherborn Library because of commuter patterns, as well as the larger, separate children's rooms, and the ability to pick up Minuteman Network requests. Sherborn patrons also frequent the Dover Town Library because of their separate children's room and for picking up Minuteman Network transfer requests via the delivery options. Although the inter-library delivery system is funded by the state and issued to all certified libraries, the Minuteman Library Network offers the Internet feature in their software to request Minuteman materials and specify the convenient pick-up spot. As Sherborn does not belong to the Minuteman Network, we do not appear on the online list of delivery locations, although we do indeed receive daily delivery. This convenience of requesting Library materials with delivery choices integrated in the software has attracted Sherborn patrons to other libraries, to a greater degree than in previous decades, but has not detracted from Sherborn's use of its own Library collections and services, as per the results of the 2004 survey. Sherborn patrons have always utilized the collections of Natick and Framingham libraries in addition to our own,

long before the days of automation, to supplement our small collection, a resource sharing privilege which is established by the state aid program.

There may be an assumption that libraries in smaller towns are facing the challenge of being overshadowed by urban or larger suburban libraries, but in fact, small town libraries, even branch libraries, are community hot-spots that are cherished by their constituencies. They are not dismissed as being redundant even in the recent stringent economic climates. Resource sharing software has also blurred the lines of collection sizes and depth; in fact, the smaller libraries are perhaps less picked over by walk-ins than larger municipal libraries and their copies may come up for borrowing more frequently in the resource sharing database. The visible strengths of small libraries, such as attentive customer service, cozy and friendly atmosphere, the scaled-down, selective acquisitions policies, such traits incite in patrons a passionate support, a choir of highly vocal advocates. Small libraries are accessible and approachable. Whether or not citizens live in a small town by choice, their library patronage is equated with visiting their community, to see others and be seen by others. Our Library provides a sense of connection that even technology tries to emulate.

Sources of Information

The Exhibit spreadsheet appending this document is generated from the Massachusetts Board of Library Commissioners "Public Library Services At-a-Glance", available for viewing online at <http://mblc.state.ma.us>. The MBLC publishes this information based on the annual report that libraries are required to file with them to be eligible for state aid. In most towns, the Library Director completes the form.

The most current information published on their website as of August 2006 is for Fiscal Year 2005 (July 1, 2004 to June 30, 2005.) The figures reported by the comparable libraries may be effected by: construction of a new building, which would drive up operating and personnel costs, as well as a potential downshift in the level of activity while in temporary quarters. Another possibility that would drive up activity is the temporary closing of a neighboring library during construction – adjacent libraries would feel the impact of absorbing the patrons during the reduced hours and services of a nearby library undergoing construction or major renovations. A third factor that many librarians attest to is the introduction of a media collection, such as DVDs or netLibrary audio downloads. DVDs are often loaned for a shorter duration of time, resulting in the higher turnover in use that creates an activity spike. Media collections move through Minuteman libraries like lightning.

It is unlikely that the towns in the Exhibit have experienced significant financial reductions during FY2005, as each of the towns remains certified by the MBLC, and therefore would not have received any disproportionate cuts, the consequences of which is library decertification.

What is a Library Worth?

What is the measurement of a library's worth? The facets of the library and its institutional nuances are not captured in a calculated per capita comparison that tries to be its proof of worth. Occasionally, libraries are the subject of the popular rankings tables and some authorities argue these reports equate quantity with quality, as in average dollars spent, numbers of programs offered, size of collection, and number of borrowing transactions, so it is no surprise that the most affluent, well-educated communities most often come out on top. Many libraries are making huge inroads in critical segments of the population by promoting literacy or coordinating ESL instruction, but often the commitment of the library staff outshines by far the allocation of resources in accomplishing these efforts. There are many intangibles that polish a library's reputation. Generally, the value a community places on its library is

assessed upon how well a library connects them to their own community, and from their own community to their private lives.

A good example of the anomalies in a quantitative study is illustrated by looking at Sherborn's per capita operating income expenditure for the Library.

- At \$72.58 per capita in FY05, we are the third highest ranking library on the list after the towns of Lincoln and Carlisle.
- In addition, we have the highest per capita rate of professional librarians on the chart, i.e., those possessing a Master of Science degree in Library and Information Science, and we pay more salary per capita than many of the larger libraries on the list.
- Viewed on the per capita scale, we also offer the highest number of items in the collection per resident.
- We are open as many hours to the public as towns twice our size or greater.

Yet the excellence displayed on the per capita level adds up to one of the lowest actual operating budgets. Some reasoning of this might be:

- Sherborn, Lincoln, Carlisle, and Dover are among the smallest towns on the list, and are semi-rural communities, so fewer people and less industry foot the bill.
- Sherborn's complement of professional librarians is made possible by utilizing volunteer staff and directing the paid personnel resources into the most skilled workforce we can afford; the high salary expense per capita is a "false positive" because, up until FY05, when the final installment of the Town-wide, 3-year compensation upgrade, the consultant's study showed our Library wages lagged behind the same towns on the exhibit. The figure is another example of the distribution of cost over a smaller number of people.
- After Lincoln, the Sherborn Library has the largest facility, but we are also at full capacity for our available stack space. We have not renovated the building in 35 years to meet the collections and services changes.
- The number of hours we are open is actually a stretch for the number of staff we have to work available shifts, which would not be possible to maintain without the help of our volunteer staff. At the same time, if we were open fewer hours, the inconvenience to the public and the community groups that meet in our facility would impair service and result in a loss of activity.

The fact that Sherborn Library employs talented staff, offers a variety of resources available in the collection, is the beneficiary of an inviting, spacious facility, and maintains convenient hours are the jewels in our crown, and we intentionally focus all of our available resources on this core of strength so that despite our smallness, we continue to appear on the MetroWest library map.

The Economy of Scale

Carlisle Public Library serves the second smallest community (pop. 4,830) on the list after Sherborn (4,230.) Carlisle's library operating budget is 43% higher than Sherborn's budget. The per capita breakdown shows that nearly all the factors between Carlisle and Sherborn are equal, except Carlisle spends more than twice the amount Sherborn spends on library materials, the definition of which is books, audiovisual, periodicals, and databases (Sherborn \$47,967 : Carlisle \$97,896.) This is an extraordinary difference, considering that Carlisle's collection holdings are fewer than ours and the square footage of their facility is smaller (Sherborn 18,000 sq. ft. : Carlisle 11,500 sq. ft.) Another factor in which Carlisle surpasses

Sherborn is in the circulation activity and, in looking across the list, all of the libraries with the exception of Ashland surpass Sherborn for the materials expenditure and Millis for circulation activity. There may be a correlation between the other libraries' memberships in large library networks and their materials expenditure and circulation activity, because certainly that is the only missing element at the Sherborn Library.

Several other factors on the scale show the Sherborn Library's strengths. Our professional staff full-time equivalent (number of staff hours worked by librarians who hold the Master of Science degree in Library and Information Science) is the third highest after Lincoln, Sudbury, and Natick. This strength represents our distillation of high quality service, although we do not always have a professional staff person on duty for all shifts because of the high number of hours we are open to the public. The number of hours we are open per week is equal to or exceeds the 10 libraries on the spreadsheet. In addition, the number of reference questions our library answered in FY05 ranks with or surpasses several of the libraries whose population size is two to three times the size of Sherborn. The operating expenditure per borrowing transaction is the highest of the comparable towns because of the lack of regional network activity resulting in a lower volume of annual transactions. The total staffing full-time equivalent per 10,000 borrowing transactions exceeds that of the other towns. The Sherborn Library statistics show significant output of service on one of the lowest operating budgets, yet having the same cost of goods, utilities, and personnel as the other libraries.

Thoughtful members of the public recognize this paradox: in the 2004 survey, a patron wrote "Thank you for doing a wonderful job with limited resources."

The fiscal situation of the Sherborn Library parallels what the Town of Sherborn at large struggles with across the board, the challenges of meeting basic operating costs assessed upon a small number of households and little opportunity or value for economic development to help raise municipal revenues. A 100% increase to the Library's budget would still be less money than the Lincoln Public Library budget, a town of only 8,000 people (2005.) At the same time, a 5% increase, an astonishing sum in this economy, is less than \$1,500. A 10% reduction would nearly wipe out the Library's budget for books, or the entire part-time staff, which would reduce the Library's hours of operation by more than half.

Indeed, it costs a small town a great deal more per capita to offer a minimal standard of service. On a state-wide basis, an obvious pattern will emerge from examining the chart exhibit of towns in our population group. The high per capita factor becomes most evident in small towns within commuting distance to Boston, and also the prosperous villages of Cape Cod. The geographic position of Sherborn and the assets it offers in terms of open space, excellent schools, a population demographic-elite and proximity to Boston raises the bar of our patrons' expectations of our performance. Costly as it may be to support Sherborn's basic and somewhat meager municipal infrastructure, there is no disadvantage to be had in living amid the peace and quiet of a rural landscape but within 20 miles of a world-class city, and surrounded by the nation's best schools, hospitals, universities, and libraries.

Mission Statement

The mission of the Sherborn Library is to provide the community with access to information and promote life-long learning, recreational reading, and cultural advancement. The active words in our mission statement are:

- Mission
- Provide
- Community
- Access
- Information
- Promote
- Life-Long Learning
- Recreational Reading
- Cultural Advancement

This planning process serves to examine the status of our Library's programs and performance in the community in light of the above concepts which we strive to promulgate in our stated mission. The document makes further recommendations that aim to improve or update the Library's methods in a five-year time frame. It is a useful guide that should be consulted annually and updated with an action plan that permits local Library leaders and advocates to identify obstacles and opportunities to progress, and to rearrange priorities according to the times. At the close of the five-year mark in 2011, revisiting the accomplishments and shortfalls of the plan will result in greater accountability for directing the future of the Library.

1. MISSION

An organization sets a mission to instill vibrancy and commitment in the actions of its leaders and staff. The mission statement also helps define the role of the organization and shape the expectations of its constituency, the Library's patrons.

The success of the Library's mission depends upon:

- Board of Library Trustees
- Library Director
- Library Personnel
- Friends of the Library
- Advisory Committee
- Personnel Board
- Board of Selectmen
- Massachusetts Board of Library Commissioners

Assigned to these agents are areas of responsibility described below that help to fulfill the Library's mission.

Board of Library Trustees

The Trustees' responsibilities for the Library are stated in their by-laws. They are an elected board of nine individuals whose chief officers are their Chairperson, Treasurer, and Recording Secretary. The Trustees also have working subcommittees of three or four members who focus on the completion of research or duties to be adopted by the full board at their scheduled meetings. The five subcommittees focus on building and grounds, personnel, technology, finance, and planning. The subcommittee structure has been very effective and efficient. It enables the entire board to be well informed on a specific area of the Library and puts their personal talents and interests to the best use.

An effective Trustee is knowledgeable about the Library without confusing his or her role with the roles of the Director and staff. The Library Trustees set policy based on recommendations for the Library Director and staff, and in practice they help the institution adhere to its policies.

The Library Board of Trustees should be realistic about the setting goals and have the best interest of the Library at heart in working to reach a consensus on issues.

It is essential for Library Trustees to be willing to take a stand for the Library as a liaison to Town Government and to assertively garner municipal funds without sacrificing civility.

The ability to motivate the Library Director and Friends of the Library group to always do well, if not to strive for excellence, requires of Trustees the brand of leadership that sets the stage of a supportive environment where people flourish.

As implied by the root word of Trustee, the generations do trust the keeping of the Library's legacy to its leading elected board.

Library Director

The Library Director's job description is tied to the mission of the Library. The education and experience of the Library Director enable her to invent the Library's mission. Receptivity to the public and staff help her to apply the mission to day-to-day operations. Formal reporting to and consultations with the Board of Library Trustees shape her decisions. Involvement with the Friends of the Library Board is a source of regular feedback. Strength in communicating with Town boards and officials help make the Library relevant in the municipal sector. It is the Director's responsibility to pick up the signs and signals of the mission status to measure how well the mission is relayed through the facility, programs, personnel, and collection. The Director develops statistical methods to gauge the use of services and keeps records that prove and illustrate the Library is on track. The title Director has a literal meaning associated with it that the position works to pull it all together to maintain a coherent organization, and to challenge the Library to reach higher performance levels.

Library Personnel

The professional Librarians have graduate degrees in Library and Information Science and gained specific knowledge that makes them experts in the area of their job descriptions for reference, children's, or cataloging services. Because of their education, they are inspired people who bring to the job their own vision of the mission of the public library. They are the visage of the Library as they come into contact with patrons on the front line and make the important first impressions. Professional staff must demonstrate they can translate the Library Director's imperatives for service and influence the organization with their own insights to develop, improve, or modify services. They implement their own methods of accountability to communicate the effectiveness of their actions and ideas.

Friends of the Library

Public libraries around the nation have established Friends of the Library organizations who help raise funds for target projects or support ongoing programs. Friends groups have risen in support of public libraries as a direct result of the impact of the institutional mission.

Recognition that a ground-swell of support could be raised when necessary for libraries and a community's interest in getting involved with their public library are incentives for establishing and joining the Friends' group. The Sherborn Friends of the Library are a 501(C)3 organization having non-profit, charitable status in Massachusetts. The Sherborn Library Friends bring vitality to the mission of the Library. They serve as Library advocates on the grass-roots, neighborhood level. They raise funds to support innovative or enrichment programs that are beneficial for the community and enhance the quality of life in the Town. But the Friends' activities are not exclusively about bringing the necessary dollars to the table. Indeed, their fund-raising activities always take the form of creative, much-anticipated community events that make people feel good about living here. The ongoing membership dues that the more than 200 citizen members donate are a direct response to their glad participation in such programs and for their use of equipment or materials that the Friends have funded.

Advisory Committee

This committee is the Sherborn's financial advisory board appointed by the Town Moderator. The Advisory Committee assigns liaisons to each municipal department to scrutinize the requested budgets prepared by the department heads for presentation to Town Meeting. The Sherborn Library's budget is certainly one of the most conservative budgets consisting of only 1.7% of the total municipal budget. The Advisory Committee has the responsibility to fairly allocate funds to the Library's operating budget and to help interpret costs, as the Library only requests funding to support services the community itself has articulated it wishes to preserve or attain. Failure to regard the Library's budget requests fairly would discount the Library's ability to carry out its mission and would have a detrimental effect on the infrastructure.

Personnel Board

A library is only as good as its personnel. The Town Personnel Board plays a part in fulfilling the mission of the Library by ensuring the rate of pay for the Librarians is competitive with area towns so that Sherborn can attract and retain talented staff. Factors such as the education and training required of the Sherborn Librarians in their job descriptions, and the specialty of their work should be weighed when setting peer positions with pay rates across the municipality, and the status of peer positions in other town libraries must also be taken into account.

Board of Selectmen

In the municipal hierarchy, the Library Trustees ultimately report to the Board of Selectmen. The Selectmen help further the Library's mission by including the Library's issues, goals, and aspirations in the vision of Sherborn's future.

Massachusetts Board of Library Commissioners

The Commissioners are appointed by the Governor of Massachusetts to oversee state and federal funding disbursement that is tied to specific library programs. The Office of the MBLC also works to garner funding for Massachusetts libraries through the legislature. Obtaining public funding for library programs ensures that all the citizens of Massachusetts by way of the local government process have equal access to information and the opportunity to educate themselves using the public library system. The MBLC is a champion of freedom of access to information. They are a voice of a democratic value and the local library leaders and librarians are their choir. The MBLC works to strike a balance between the haves and the have-nots by disbursing funds that encourage cities and towns to share their resources on the state-wide

level, and provide an open-door and free service to the Massachusetts citizenry. The MBLC also offers incentive programs that challenge cities and towns to develop and improve their local public libraries. The agency staff coordinates in Massachusetts the regulations, reporting mechanisms, and programs designed to achieve this mission that stems from the American creed.

All of these entities play a part in fulfilling the Library's mission, so that we never find ourselves in the position as a town or a country learning the hard lesson of realizing a library's value by subtraction - its absence.

2. OUR MISSION – THE ABILITY TO *PROVIDE*

The Library's ability to provide service relates to our effectiveness in delivering our product. This is primarily accomplished through personnel.

Goals and Objectives for Personnel

The Library has always been very involved in preparing information for the Town in support of competitive wages for Library staff. The Library Director helped develop and implement the Town-wide performance appraisal documentation and process. Five years ago the Town hired a consultant whose findings significantly improved the status of wages for Library personnel, and these increases were implemented over a four year period. The Town Personnel Board is now in the process of making sure all Town employees are still receiving competitive rates of pay. The evidence of its impact is in our retention of staff since the upgrades took place. We have retained staff for a minimum of five years. The former retention rate was one year.

- Work with the Town Personnel Board to implement the results of the FY2007 data they assigned department heads to compile on comparable town wages, hours, job descriptions, and pay periods.

Timeline: Begins September 2006

Technology has altered job descriptions and additional training opportunities that augment Library Science skills are necessary. The Library should look for opportunities to cross-pollinate with non-public library personnel to introduce more efficient approaches to traditional procedures. Continuing education is always required for staff to keep pace with technological advances that are becoming popularized. Web design, desktop publishing, and basic proficiencies in using hardware and software should become part of the routine training and additional funding sources to support participation should be explored. After enrollment in training programs, the Library should provide an atmosphere where the new skills may be practiced. The measure of the usefulness of investing in training programs for staff will be evident in an increased ability for staff to work independently, to solve problems, and to make recommendations for keeping their job area current with proper tools and cost-effective practices.

- Identify continuing education opportunities that prepare staff to help shape the Library's future direction, examples: website design, cataloging efficiencies, networks.

Timeline: FY 2006 – FY2011

- Identify the software and hardware tools and supplies that aid staff in producing high quality work, and install them at staff workstations.

Timeline: FY 2006 – FY 2007

The 2004 Town-wide survey brought in rave reviews of the Library staff's skills and effectiveness. Continue to bolster morale by creating a team-work atmosphere among professional and paraprofessional staff. The measure of our success in attaining this goal will be evident in higher circulation of our materials, increased use of the Library as a reference center, and greater community involvement in our programs.

- Procure funding for staff development programs that improve and synchronize our ability to deliver high quality customer services.
Timeline: FY2008-2009
- Contingent upon a renovation or expansion of the Library facility, identify additional staff hours and positions necessary to staff new or enlarged space
Timeline: FY2009

3. OUR MISSION – STAY ACTIVE IN THE COMMUNITY

As the Town history, current community analysis, and future demographic projections indicate, Sherborn will remain a small town. The smallness of the Town cultivates a very strong sense of community among residents. And yet many of the residential areas in Sherborn do not actually represent conventional neighborhood settings that are conducive for neighbors to meet casually or for children's free play. For this reason, an extraordinary number of Sherborn households are involved in voluntary committee work for the schools, Library, civic and cultural organizations, and local government. The Library at its dedication was given the dual title of community center, and it has fulfilled that characteristic by often serving as residents' first meeting place in the children's space, at Library programs and volunteer opportunities, and on the Friends of the Library Board. In the 2004 survey, the Town was referred to repeatedly as one of the Town's finest assets. It is essential for the Library to continue to earn the high regard of the community. We can measure our success at achieving this goal by evaluating how well we serve child, youth, adult, senior, and super-senior patrons.

Children's and Youth Services

The resources available and momentum for offering excellent child and youth services at the Sherborn Library are actually far greater than the available space we can allocate to integrate them. For this reason, the Library has developed a comprehensive building program that has been approved by the Board of Library Trustees and is under review by the Massachusetts Board of Library Commissioners. The 2004 Town-wide survey garnered a great deal of feedback about the strengths and weaknesses of our existing children's area, and those remarks have been taken into consideration in the building assessment document. Comments append this document.

- Launch a Library card sign-up campaign coordinated with the American library Association program
Timeline: September 2006
- Submit to the MBLC the building assessment document and work to garner the MBLC's authorization to activate renovation plans.
Timeline: October 2006

- File the Letter of Intent with the MBLC, if appropriate, to garner the Library's eligibility for state funds for feasibility and design projects.
Timeline: October 2006
- Utilize the grant from the Richard Saltonstall Charitable Foundation to help fund a professional feasibility study and select an architect to conduct the study.
Timeline: Fall 2006-Spring 2007
- Continue to work with the Friends of the Library to identify successful fund-raising events to build the Library's financial resources.
Timeline: FY 2007
- Inform the Town of the initial costs associated with the renovation and timing of state construction funds.
Timeline: FY 2007
- Work with the Board of Library Trustees to plan for additional grants to augment the endowment resources for a renovation project.
Timeline: FY2007-FY2010
- Inform the Town of any anticipated operating cost increases associated with a building renovation.
Timeline: FY2008-FY2009
- Apply for state construction funding.
Timeline: FY2008-FY2009

Adult Services

As the community analysis shows, Sherborn is a well-read community and adults make regular use of the Library for recreational reading, cultural and educational programs which are sponsored by the Library and by community organizations in the meeting space, and for research and computer access. Public library use is an honored family tradition that is continued in the golden years and instilled in the toddlers for all the years in between. In 2005, the Library launched "Worlds Together" a successful book and film series that focused each month on a different country. This self-guided reading program and coordinating film attracted an interested audience, and introduced patrons to literature and media they would not have discovered on their own. The Library was awarded a New England Foundation for the Humanities grant that enhanced the series with an installment of books and scholarly lecture on the Middle East.

- Implement the 2006/2007 reading theme focusing on "Banned Books" and show movie tie-ins to continue the success of the "Worlds Together" initiative.
Timeline: October 2006 – May 2007

In the 2004 survey, the community expressed interest in expanded media collections. In response to this, the Library allocated additional funding to purchase DVDs, compact discs, and purchased the license from NetLibrary/Recorded Books for audiobooks downloads. To further the success of our response, the Library has set these goals:

- Purchase the MP3 player and organize training sessions for the public to learn to download audiobooks from NetLibrary/Recorded Books service.
Timeline: November 2006
- Continue to inquire of MassCat as to the status of developing policy that would permit the Library to integrate MARC records for the NetLibrary collection in the MassCat database.
Timeline: January 2007
- Create a media equipment center in the future expansion plans that would enable patrons to utilize hardware for downloading music, spoken recordings, DVDs, and imaging/digitizing projects.
Timeline: concurrent with proposed renovation

Services to Senior Citizens

The Library established the “Bring a Book” delivery program to housebound residents, including senior citizens and patrons who are temporarily unable to transport themselves to the Library. A team of volunteers are on call to deliver books and other materials to housebound residents. This service is widely publicized throughout the Town.

The future demographic projections show that Sherborn’s population will shift to an increasing number of senior citizens, which makes sense as the baby boomers approach retirement. The Library’s Building Assessment document recognizes that the proposed renovations to make a separate children’s area directly benefits the adult reading area of the Library, so that adults and senior citizens will be able to spend quiet time here, and make use of not only an inviting community living room, but also enjoy the concept of a media center that features equipment for listening to books, music, and viewing movies, as well as creating digitized material.

The Library Director has been invited to give book talks at the senior housing community room which has spurred interest in increased readers’ advisory service. The Library continues to make use of a gift in memory of a citizen for the purpose of acquiring large print books, and uses a portion of its Friends’-funded subscription to the McNaughton book leasing plan to refresh the large print collection.

The majority of our volunteers are from the senior citizen set. Their active involvement with the staff and the opportunity the Library’s volunteer program gives them to stay connected to the community and learn new skills is a win-win situation.

Interaction with Community Groups

The Friends of the Sherborn Library is a vibrant community organization that not only greatly augments the Library’s ability to provide service and innovate, but also enhances the endeavors of other community groups and civic organizations with a cooperative, supportive spirit. The Library has won the visible support of the Sherborn Lions’ Club, the Sherborn Garden Club, the Boggestow Garden Club, the Sherborn Arts Council, the Sherborn Historical Society, the Sherborn Historic Commission, and Sustainable Lifestyles. The Library has programs of reciprocity established with the Sherborn Council on Aging, the local churches, the Sherborn Community Center Foundation, and the Sherborn Fire and Rescue Association. Staff appears on occasion at the all-school meeting to announce services to the elementary school, and distributes “Sherborn Unplugged” resources and literature throughout the Dover-Sherborn Middle School and High School.

Goal for the Friends of the Library:

- Provide the Friends with guidance and consultation for managing their resources and assist them in plans to raise further financial support for Library projects.

Timeline: FY2006-FY2011

Library Volunteers

The Library encourages, trains, and nurtures social opportunities for more than 18 working volunteers, several of whom are part of the senior citizen tax work-off benefit. Most of the volunteers help to run the circulation desk where they are able to meet and mingle with members of the community, but a team of volunteers are assigned to special projects such as newspaper indexing and technical services projects. The Library also has an active role in helping Middle and High School students to fulfill their community service hours, and develops projects and structure for scouts to achieve their eagle status. Staff organizes an annual social event to honor our volunteers that helps to create a bond of good feeling and a sense of team work. Because of the significant number of hours the Library is open each week, the staff depends on volunteers to help relieve their stations throughout the day and help cover shifts.

4. OUR MISSION - ENABLING ACCESS

The Sherborn Library is open 54 hours a week and is one of the few small libraries in the state (besides the Cape Cod libraries) that opens some weekend hours in the summer. The number of hours we are open to the public is one of the factors where we exceed state standards, but certainly not the expectations of the community. Convenient access to Library services and the facility is a major factor in keeping the Library relevant to residents. Weekend hours are bustling throughout the year. The three nights that we are open during the week are ideal for quiet study, but also several community groups have regularly scheduled meetings in both the Library Theater and Conference Room. When those meetings are held at night at the Library, the meetings run until 9 p.m.

The access factor of our mission relates not only to the privilege of visiting our facility and finding appropriate services when needed or wanted. It also encompasses making provision for the disabled. In the 1990s, the Town provided funds for the Library to explore options that would bring it into compliance with the Americans With Disabilities Act. Having explored and documented the options to modify the existing building, the Library Trustees agreed that the most prudent and beneficial plan for maximizing access to all patrons would be to meet the ADA standards as part of a larger renovation plan.

Access also means the building should be safe, clean, comfortable and conducive to quiet study as well as accommodating lively group events that are encouraged by our mission. The Library's Building Assessment document examines the issues that should be addressed to ensure these conditions are met.

Goals to improve access:

- Work to secure adequate funding in the municipal budget process to maintain the hours the Library is open, which entails funding for adequate staffing levels, utilities costs, and routine building maintenance.

Timeline: FY2007-FY2011

- Incorporate the issues in a professional feasibility and design study that are documented in the building assessment to renovate the space to adequately meet the services anticipated by all patron factions, child, youth, adult, senior citizen, and disabled members of the population.

Timeline: Procure MBLC funds FY2007

5. OUR MISSION – THE SOURCE OF INFORMATION ACCESS

Technology and libraries are now synonymous. The Sherborn Library has a technology plan and inventory that append this document. The Trustees' Technology Study Committee are positioned to evaluate our existing technology scenario and are prepared to migrate, if deemed necessary and when timely, from the EOS International Q Series, and MassCat, to another vendor. The 2004 Town-wide survey showed enthusiastic interest and support for the Sherborn Library to join the Minuteman Library Network. The Trustees have begun to plan for this likelihood, and have included in the Building Assessment document a section that discusses the implications if we do, or do not, join MLN.

Goal of technology:

- Stay informed of developments in MassCat that may be relevant to improved resource sharing, such as a shared circulation module and a presence in the state Virtual Catalog
Timeline: FY2007-FY2009
- Work with the Trustees' Technology Study Committee to evaluate the various options for future automation, including EOS.Web, and integrated library system (ILS) vendors, MassCat, the Virtual Catalog, and Minuteman.
Timeline: FY2008
- Add workstations to the children's and young adult areas of the Library on both the WIFI network and LAN
Timeline: FY2008
- Propose to the Board of Trustees the best scenario to serve the Library's long-term technology and information access needs, and make recommendations for funding sources to make this transition.
Timeline: FY2009
- Implement a new system and provide the staff with ample training to navigate the system, and adjust job descriptions and realign personnel to meet the change. This action may be driven by the obsolescence of our existing technology and pre-date the renovation plans, or may be planned as part of the renovation.
Timeline: FY2009

Access to information is dependent upon qualified, talented staff to guide patrons through the Internet, databases, print resources, and interlibrary borrowing. The Library has designed and maintains its own website that has links to numerous Internet sources, MLIN, MassCat, MLN, the Sherborn community information page and official Town website, and other networks.

Reference Services and Readers' Advisory Service

The Sherborn Library prides itself in practicing an approach to reference service that strives to anticipate the community's information needs. The Library staff believes it offers attentive

customer service and determination in fulfilling patrons' reference questions, and certainly recognition of this was expressed by the community in the Town-wide survey. The actual number of reference questions answered annually was 3,027 in FY2006, about 20% higher than the figure reported 5 years ago in FY2002, derived from a daily count. The Library has also conducted an in-depth reference study quarterly. Analysis of the study shows that:

- 65% of all reference activity is generated by adult patrons
- 27% is generated by juvenile patrons
- 7% is generated by young adult patrons

The nature of the reference questions is distributed across the following roles:

	<u>Popular information</u>	<u>Independent Learning</u>	<u>Formal Education Support</u>
Adult:	55%	35%	10%
Child:	65%	20%	15%
YA:	45%	10%	45%

Most of the reference transactions (65%) take place in person from all three groups. About 12% are conducted by telephone. The Library began to promote email communications through a mail-form it developed called "Sherborn Connects" in 2005, so only 1% of our reference questions arrived via email. In FY2006, the Library answered about 1 question per hour.

Allocation of funds to the reference collection:

About 41% of the Library's materials budgeted for the adult collection was allocated to the adult reference collection in FY2006. This is about 6% higher than in previous years because of a resource updating project that took place in FY2006. Some of these resources have been selected for young adults using the adult budget.

About 10% of the juvenile materials budget was been allocated to the reference collection. This figure includes expenditures from the Children's Endowment Fund.

Goals to improve reference service to adults, teen, and children:

- Ensure the customer service training mentioned in the personnel section above a component on the delivery of reference service.
- Make an active, concerted effort to increase reference activity by outreach to patrons and publicity. Strive to meet a goal to increase reference as measured by the quarterly, in-depth study by 10%.
Timeline: _____ FY2006
- Setup a usage survey on the print reference collection for adults to gauge the feasibility of renewing continuations, and reallocate any savings to more active collections.
Timeline: _____ Fall/Winter 2007
- Work with the space planner as per the Building Assessment document to improve patrons' self-help access to the adult reference collection so that it no longer appears to be the Public Services Librarian's private work area.
Timeline: _____ FY2008-FY2009

- Work with the space planner as per the Building Assessment document to improve the definition of space in the children's area for the reference collection and allocate space for workstations for child and young adult research.

Timeline: FY2008-FY2009

In addition to social programs such as "Worlds Together" and the planned reading course of banned books, the Library has made tremendous strides in implementing readers' advisory programs that have caught the public eye. Press releases for pre-publication alerts of titles to be released in the upcoming month run in the local newspaper column dedicated to Sherborn Library news, and accompanying signage is posted at the Circulation Desk alongside the NYT Best Seller List and the monthly compilation of Library Journal's list of books on demand at public libraries. Displays of books flagged with staff recommendations and reviews are scooped up promptly by patrons. We also developed book marks that flag the "Patron Picks" available with the new book shelving, and encourage patrons to highlight their own outstanding reading.

6. OUR MISSION - PROMOTING THE LIBRARY

The Friends of the Library does an outstanding job of promoting the Library throughout the community with its annual appeal and newsletter. The Library appears weekly in the local paper in its own column, as well as special news coverage for our events. The Library appears from time to time in The Boston Globe "West Weekly" section. The Library invites patrons at the point of Library card registration to add their names to our email news of programs. We design eye-catching signage and post our flyers throughout the Town and in neighboring towns. And, as mentioned above, we keep our website up to date and actively promote the URL and contents.

The Friends' support of child and adult programs draws citizens into the Library if they are not regular borrowers from the collection, and this attraction often leads to their membership in the Friends and Library patronage.

Goals to promote the Library:

- Work with the Friends and Trustees to develop a brochure that describes the opportunities to donate to the Library, both as members of the Friends and also for contributing to the endowment fund.

Timeline: FY2007

- Distribute the decal and bumper stickers as incentive items for book club participants and Friends' members.

Timeline: Fall 2006

- Establish a stronger communications link to the Middle School and High School libraries for enriching the collection in areas of the curriculum, and initiate a youth representative to the Library who can provide insight as well as fulfill his or her community service hours.

Timeline: FY2007-FY2008

7. OUR MISSION - LIFE-LONG LEARNING & RECREATIONAL READING

Libraries were developed because America's brilliant founders realized that the education of the populace didn't stop after school was over. The creed of free thinking is supported by the institution of public libraries. The value of self-directed learning is planted in the youngest child by public library outreach in communities. Throughout every stage of life libraries have their use. The area of importance shifts according to the demands of patrons' lives. From the joy of choosing picture books to borrowing resources to fulfill homework assignments, from summer reading books and a quiet place to read, study, and arrange group projects to researching colleges, from teaching your own child to read, using the Internet for a job search, catching up on the classics or borrowing bestsellers, movies and CDs for leisure, the public library moves forward with the human life cycle.

To be strong in its mission of furthering life-long learning, the Library must have a diverse collection of up-to-date materials and the purchasing power to acquire high demand books and media that rises with popular culture. A small library must have equal access to resource sharing opportunities sustained by the public library system in order to back up its own collection for its patrons. Although a small public library cannot offer the depth of collection possible within its space and budget limitations, small public libraries must do their very best to display an adequate representation of materials for all factions of the life-long learning process. The introductory level of materials offered may be broadened by the skill of the librarians in tapping the Massachusetts public library system using technology and human intelligence to identify additional resources.

Goals to further patrons' life-long learning experiences:

- Evaluate areas of the collection for timeliness and withdraw seldom used resources.
Timeline: FY2007
- Reapportion reference collection funds to support collection development in circulating areas of the collection and media collections.
Timeline: FY2007
- Investigate opportunities for grants that focus on library services to the youngest patrons and their caregivers.
Timeline: FY2008
- Use the Building Assessment exercise to rearrange dedicated, age-appropriate space for pre-schoolers.
Use the Building Assessment exercise to identify new space for the school-aged child that includes a communal study area, workstations, and media equipment.
Use the Building Assessment document to rearrange the furnishings and collections for young adult patrons, including a communal study area, workstations, and media equipment.
Use the Building Assessment exercise to dedicate new space to a media center for collections and equipment.
Timeline: FY2008-FY2011

Library Circulation

One indication of how well the Library measures up to adequately meeting the needs of the life-long learning process is reflected in the annual circulation statistics. Certainly this is not the only indication, as computer use, programming attendance, use of reference and non-circulating periodicals, meeting room use, and reference service are not reflected in the figure. The discussion below looks exclusively at the number of items checked out of the Library each year. Special attention is given to this subject on the long-range plan because the Library profession

continues to give weight to the annual borrowing of material from libraries in ranking their effectiveness.

Summary of circulation activity at the Sherborn Library:

- Responses to the 2004 Town-wide Library survey show that 90% of our patrons rely on our Library to borrow books, and area libraries with stronger media collections are being utilized by Sherborn patrons to supplement our small collection. High demand of media collections between libraries has been reported as a trend.
- The Sherborn Library's FY2005 annual circulation was 82,431. This represents 19.49 items borrowed per capita. Only 474 items were borrowed in FY2005 via interlibrary loan, so this annual circulation figure is the use of the local collection. Non-residents of Sherborn borrowed 4,852 items from our collection as walk-in patrons.
- Circulation of adult print material has increased 25% in five years which represents an annual growth rate of 4.52% for each of the 5 years of circulation activity.
- For the same time period, the juvenile borrowing from the print collection increased more than 67%, an annual rate of growth of 10.86% per year.
- The annual growth rate over 5 years for adult use of the audio-visual collection is 30% per year.
- The 5-year growth rate for children's use of audio visual collections is 17.45%.
- The respondents to the Library's 2004 Town-wide survey showed that 70% of the Sherborn Library's patrons augment their use of the Library by accessing the Minuteman Library Network to request network transfers of material.
- The MassCat network which includes the Sherborn Library's collection may not adequately meet patrons' Library automation expectations or needs, as it does not support online requests and is excluded from the state-wide virtual catalog.

The following analysis serves to define and analyze the various components that impact circulation as an output measure in its support of life-long learning. The Library has identified nine components that effect output as seen in the annual circulation:

1. Community Literacy
2. Definition of Library Circulation.
3. Statistics and Data Sources.
4. Profile of the Collection.
5. Interlibrary Loan, Networks, and Resource Sharing.
6. Impact of Personnel.
7. Impact of Funding.
8. Circulation Projections.
9. Circulation Charts and Graphs.

Sherborn Reads

The Sherborn Library is fortunate to serve a community of readers, of families and individuals who practice an established library tradition that is valued and integral to their daily lives. Our readers are comprised of a good balance of non-fiction devotees, *literati*, and exuberant best-seller fans. Many cross-over for a change of pace, influenced by their participation in the rising number of neighborhood book clubs, favorable book marketing impressions made upon them by the media, or in taking the Librarians' recommendations and noticing the Library's inspiring displays. Although nation-wide surveys report that time spent reading is decreasing, the Sherborn Library has enjoyed significant increases in the use of the circulating collection by the community, as illustrated on the appended chart and graph exhibits.

What Do We Mean By Library Circulation?

The phrase “library circulation” traditionally represents the number of items checked out at the circulation desk to patrons: books, periodicals, audio-visual materials, and museum passes. Not included in the chart’s circulation and usage statistics are the in-house use of newspapers, periodicals, reference books and reference services, the use of the local history collection, hits on the Library’s website and e-books, and the use of the Internet and auxiliary Library services, such as attendance at programs, and the reservation of meeting rooms and equipment. The sole reliance on “circulation statistics” kept by the computer for each item checked out to gauge usage and judge the strength of the Library is only one facet of a strong array of services the Library provides.

Regular usage of the *non-circulating* collection and auxiliary services is considerable, and would greatly increase the figures shown on the exhibits on usage. For example, there are numerous citizens who consult the Library’s business reference sources, consumer magazines, and daily newspapers everyday. The Library is also aware of the steady traffic of users who strictly use the Internet computers and are not registered to borrow from the collection - they do not use the Library for any other purpose but to check their email or search the Internet. These non-borrowing users also have a high impact on the personnel and collection resources of the Library, as well as its technical and physical infrastructure.

Data Sources

Two scenarios were examined to track usage of the circulating collection. We compiled an overview of trends from FY1995 (beginning 7/1/94) to FY2005 (ending 6/30/05), an 11-year period, and a second, shorter-term view from FY2001 (beginning 7/1/00) to FY05 (ending 6/30/05), a five-year span. For the 5-year span, the statistics were generated by the Library’s system software: the EOS International *Q Series* statistical reports. The 11-year scenario represents a combination of daily bookcard counts from the pre-automation days, or the time period prior to 1999, when each book had a corresponding index card on which borrowers’ names were written at the point of check-out. A tandem system of computers and card-counts ran for the period of 1999 – 2003, necessitated by managing one portion of our collection that was converted to the online public access catalog using the automated system, and the other portion managed by counting cards for each item checked out, to track those items which were not yet entered online. The Library’s collection was not online in entirety until 2003. The data collected and the manner in which it is compiled follows the annual report forms that must be filed with the Massachusetts Board of Library Commissioners each year to be eligible for library certification and the state aid award.

Rate of Annual Growth

The FY2005 (7/1/04 – 6/30/05) adult borrowing of circulating print materials is 25% higher than it was 5 years ago, in FY2000. This represents an annual growth rate of 4.542% for each of the 5 years of circulation activity. For the same time period, the juvenile borrowing from the print collection increased 67%, an annual rate of growth of 10.86% per year.

The increases in both adult and juvenile audio-visual collections are even more substantial, impacted by their recent introduction and the showcasing of our modest supply of new acquisitions for these collections to address the public demand. The Library kept pace with area libraries and began collecting videos for circulation in the early 1990s with seed money from the Friends of the Library. The Library offered a very small collection of books on tape in 1986, but relied solely on donations from the Sherborn Lions’ Club to acquire new spoken recordings. In the mid-1990s, the Library earmarked a sum from its materials budget to help

support the video and books on tape collections. The demand for videos and books on tape has been consistently high: add to this the evolution to improved formats which is rendering magnetic tape obsolete, and the Library gradually segued into acquiring DVDs and books on compact disc in 2003. The town-wide Library survey of 12 years ago (1994) informed us that patrons were also interested in a music library. The Library only began acquiring music on compact disc in 2002 with a gift from the Friends of the Library. Use and relevance of these new collections is evident in the skyrocketing figures. The annual growth rate over 5 years for adult use of the audio-visual collection is 30% per year, and the 5-year growth rate for children's use of AV is 17.45%.

The Impact of Audio-Visual Materials

It may surprise some of us that the 5-year growth rate of the use of children's AV materials is less than the adult use of AV. This is a clear indication of adults' enjoyment of the books-on-tape and compact disc collection. Use of videos and DVDs is certainly higher on the children's side of the equation, but overall the audiobook component on the adult side weighs in more heavily, surpassing the children's activity.

The Librarian has taken a careful approach to managing and apportioning the fiscal operating resources for materials by not inadvertently detracting from the purchasing power necessary to maintain the book collection at its historic levels, and to avoid spreading the available resources too thinly to afford the costly AV media. Although there has been increasing pressure and demand from Library patrons to acquire more media, and despite the knowledge that area libraries which shifted dollars into the AV collections to satisfy this demand have boasted spikes in the circulation statistics, the Sherborn Library sought new money before adding new collections. In addition, a lack of space for shelving media was a concern.

The 2004 survey response points out, that area libraries with stronger media collections are being utilized by Sherborn patrons in addition to the use of the Sherborn Library, but that our patrons rely on us for books (90%). The significant growth in Sherborn's use of our print collections, occurring at a time when the nation's polls shows a downward trend in reading habits, validates that our Library's collection management practice has attracted and preserved strong local interest, and has not diminished the number of books available to a reading community, which would have resulted in noticeable shortcomings in our basic collection. However, given the community's strong appetite for, and entitlement to, a strong media collection, the enabling dollars have followed. Surges in AV use in FY2004 directly correspond to the impact of the Friends of the Library's support in establishing the Media Endowment Fund, and to the use of the Children's Endowment Fund to begin buying DVDs. The municipal appropriation for the collection has grown incrementally to allow for refreshing these collections.

The staff of the Sherborn Library is gratified to report that the steady track record of increased use of our collections has been driven by the community's value of our book collection, not statistically inflated by the introduction and high turnover of audio visual collections.

Interlibrary Loan

The Sherborn Library's statistics on interlibrary loan have shown a somewhat erratic pattern of upward and downward trends over 11 years, but for the most part has been impacted by (1) the elimination of the Minuteman Library Network's affiliate membership status which the Sherborn Library had on-trial for the second half of the 1990's; (2) the infiltration of the Minuteman Library Network's new software that promotes and provides the streamlined convenience of self-service to request materials online; and (3) Sherborn Library personnel changes. A discussion of these

factors follows and is an important one, in that it reflects on the future of library circulation, interlibrary resource sharing, and the application of technology.

(1) MLN Affiliate Membership Status – FY96-FY99

The Minuteman Library Network affiliate membership status allowed the Sherborn Library staff to request materials directly from the Network libraries. One terminal was set up near the Public Services Librarian's desk, and the facility and ease in conducting interlibrary loan service in this manner is suggested by the dramatic rise in the number of interlibrary loans we requested for our patrons during that period. The MLN affiliate membership status was a pilot project funded in part by a grant from the Massachusetts Board of Library Commissioners. The pilot project was intended to lead the smaller libraries in the direction of joining Minuteman as full Network members, which Sherborn opted out of. Thus, Minuteman discontinued offering the affiliate membership status.

The Sherborn Library is the only public library in Eastern Massachusetts that is not part of an automated resource sharing network. In fact, across Massachusetts, almost all libraries are full members or online affiliates of the wide area network system. Rather than using the area network to communicate with other libraries for resource sharing, the Sherborn Library performs traditional interlibrary loan services using Internet access to search area libraries' collections and identify available copies. Interlibrary loan proper is mediated by a Librarian, which means we search the Minuteman Library Network or other databases to locate copies of items requested by patrons that we do not own locally. We then send an email or fax to the Wellesley Free Library and, in turn, Wellesley uses its Minuteman Library Network membership to request the item on our behalf from one of the Minuteman Libraries or, if the item is not owned by Minuteman, uses other databases of libraries' book collections to retrieve items for Sherborn. The item is then delivered to Sherborn via the state-funded library courier service.

(2) Self-Serve via the Minuteman Library Network

Automated resource sharing networks, such as the Minuteman Library Network, which is comprised of 41 public and academic libraries in the MetroWest and greater Boston area, perform interlibrary library loan by requesting a Network Transfer. This means libraries which are members of the Minuteman Library Network can directly request from another library in the Network copies of items that are not loaned locally. Unlike Sherborn, they do not channel the request through the Wellesley Free Library, because the member libraries have full and direct access to each other's collections through their shared automated system.

In recent years, an upgrade of the MLN software product has enabled all patrons who hold Minuteman Library Network cards from all municipalities to request items online from a member library directly, and specify to which library location they would like to have the item delivered for them to pick up. Patrons immediately receive an email confirmation of their request and, later, an email notice of the availability for pick-up. Patrons may also track the progress of their request online, renew the items they have checked out to them online, and view other activities on their library card account using a PIN number. This feature eliminates the need to ask a librarian for assistance in person or by phone for such transactions. It does what computers are supposed to do for us: provide communications between systems, keep records for us and about us, and cut down on travel and waiting time that happens on the interpersonal level. Remote access to libraries by computer is fast and efficient. Patrons find it so much so that the number of Network transfers rose from 430,490 in FY03 to 1,037,304 in FY04.

A recent evaluation of the skyrocketing use by the Minuteman Libraries shows that the new network software handles lists of materials on hold differently than the previous software used which accounts for the bulk of the borrowing increase. Unlike their earlier software, the new product does not allow a default mechanism to local borrowers first. The first available copy that comes up for high demand titles goes out to the next borrower on the list. And this is probably fair for the kind of equality of service and open network system that MLN promotes among its member libraries. Moving AV material across member libraries to requesting patrons has also contributed to the surge.

As it serves one of the smallest towns in Eastern Massachusetts, the Sherborn Library has often raised questions about the impact of cost to a small library's budget in joining the network. Sherborn is indeed an affluent and well-educated Town, but residents pay the second highest tax bill in the state and alarms have been sounding for budget cuts in recent years and the need for increased fund-raising.

Although the citizens of Sherborn have vocalized their interest in the Sherborn Library joining Minuteman, for example, and are active to preserve excellent schools, they are later troubled over the annual overrides which have happened every year but one since Proposition 2 ½ was voted into law. Patrons are not aware of the cost of Minuteman and assume it is inexpensive. Further, the municipal budget process has presented little opportunity in Sherborn for any one department to receive the 20% increase it would take to be an MLN member.

Another question that the Sherborn Library entertains, given the load of activity that is exchanged between MLN libraries, what is a reasonable number of requests via the network transfer that a small public library can handle. Examples in small area libraries such as Dover and Carlisle reported loaning to network libraries in FY04 as many as 17,000 items and receiving as much in return, which breaks down to an unfathomable turnaround of material that must be processed for loan and borrowing by the smallest number of staff. As many as 650 items per week are processed by those otherwise comparable libraries: Sherborn's average is 18 items borrowed for patrons via interlibrary loan per week, and there is very little network activity generated across MassCat. However, the Sherborn Library serves a significant number of non-residents in person: 12% of our patron database is comprised of non-residents and 5% of our annual circulation to non-resident walk-ins. The volume of transactions that must be fulfilled to meet electronic requests will certainly impact the staffing level, job descriptions, and collection availability should the Sherborn Library join MLN. Only one of the area MLN libraries has had a local system before joining MLN.

It is a misconception that the Sherborn Library is not part of MLN because it refuses to share its resources. That myth would be de-bunked by the many non-residents who use the Sherborn Library in person. Ultimately, the Sherborn Library configured its automated system at the outbreak of the Internet Information Superhighway, believing that the 'Net would open electronic communications between libraries under the auspices of the Nation's Telecommunications Act. The Sherborn Library also conducted a hearty analysis of its role as a small library in the wider world of libraries and identified its strengths. The Sherborn Library envisioned a supportive relationship with larger urban and resource-rich municipal libraries that would be reinforced by mechanisms of equalization by the state. We targeted any possible growth of our appropriated budget to personnel and our collection so that we could serve our local community and be a meaningful Library on the local level, and trusted that the interlibrary loan and free library system would enable cooperative relationships that would augment materials and transactions outside of our scope. And this is happening, but there is increasing pressure and criticism

because we have not added our collection to the MLN pool, only MassCat's bibliographic database.

As mentioned in an earlier section, the Library Trustees are planning for an automation upgrade to take place within the timeframe of this long-range plan. We are aware that the Minuteman Library Network loaned 25,088 items to the residents of Sherborn in FY05. This figure is roughly one-third of the Sherborn Library's annual circulation. The Minuteman figure represents Sherborn residents visiting area libraries to borrow as well as requesting items online to be delivered to a convenient MLN pick-up point on their daily itinerary. The Natick Public Library fulfilled the greatest number of transactions by Sherborn residents with 9,144 items checked out. The Framingham Public Library followed with 4,187 loaned to Sherborn residents, then Wellesley Free Library with 3,386 and, finally, Dover Town Library with 2,867 loans to Sherborn transacted. Again, Sherborn's total loan to walk-in non-residents in FY05 was 4,852.

Clearly, these libraries are on Sherborn commuters' maps. Three of the four are larger suburban libraries with deeper and more varied collections, dovetailing with the 2004 survey remarks that patrons go elsewhere for AV material and for books we don't have in our collection. A recent article in the Metrowest Daily News (8/10/05) stated 40% of all Minuteman Network transfers consist of AV material. Not surprisingly, the use of Natick, Framingham, and Wellesley libraries is consistent with our survey performed 10 years ago, in the days before MLN supported online requests. Use of those larger libraries' collections supplemented our own small holdings. However, the use of the Dover Town Library is a new migration pattern, which seems to have begun when the Dover Town Library renovated in the late 1990s, adding a separate Children's Room, more media, and membership in the Minuteman Network. Not surprisingly, we have now adopted these as our goals and many patrons expect the Library to achieve them.

Another aspect that might be added to the disadvantage side of being a non-MLN library is that delivery of materials to Sherborn via the state-supported courier service generally takes longer to arrive in Sherborn than a Network transfer takes to reach its destination library. In July 2005 the average number of days it took for ILL requests to reach Sherborn was 11.7 days, in August 2005 10.5 days, and in September 2005, 15 days. The total average of days it took for our requests to arrive over 4 months was 11.7 with 27% of the items requested arriving between 1-2 weeks, 51% arriving between 2-3 weeks, and 11% taking 3 weeks or more to arrive. We were careful to exclude weekends and holidays from the count. Popularity and ease of the Network Transfer system to borrow materials from other libraries may render traditional interlibrary loan services obsolete. A recent MLN survey shows that the heavy users of their online request service find it tantamount to their use of libraries at all.

The goal to join the Minuteman Library Network would directly benefit the Library's mission to support life-long learning by our participation in the known, perceived library software standard of patrons, the presence in the MLN database and online selection choice to specify the place of delivery, and to garner the PIN number personal account feature to request and renew materials, which has proven much more attractive to patrons than the free mail-form we developed in "Sherborn Connects" (lack of integration in the bibliographic database make Sherborn Connects cumbersome.)

Interlibrary loan and mechanisms for resource sharing must be strengthened, because they are the vital lifelines of a small public library that serves a well-educated community, such as the Sherborn Library. We have said that a good number of our patrons use the neighboring libraries' memberships in the Minuteman Network to draw from the vast, virtual library resources

of over one million unique titles in the database, and request network transfers online for themselves and their families. It provides them with more ease of access to library resources, and it provides them with convenience which is a great commodity in our current times, without which the Sherborn Library risks irrelevancy or appearing to be too limited in scope.

The annual state aid award, and its funding component known as the non-resident borrowing offset, strives to compensate libraries for sharing their resources and helps motivate the leaders of one of the Nation's most information-rich areas to continue supporting and disseminating their local library collections. However, as the public library technological infrastructure of Massachusetts continues to draw its largest constituency from the network library cities and towns, and as the state budget for supporting library services is seeing lean years, it is possible that the limited public funding may be reapportioned to maintain the "heavy hitters," the network libraries, and the Sherborn Library's means of access to resource sharing may grow more cumbersome, or obsolete, as the only non-network library. Exercises in projecting the future must envision scenarios that would require our Library to re-tool.

Budget for Collections and Collection Holdings

The Library's budget for collection development was bolstered at an annual rate of growth of 2.28% over an 11-year span shown on the appended chart. In the shorter span of 5 years, the budget has registered a .96% increase. The increases over the years have helped us keep pace with inflation and introduce new media without detracting from our buying power in all facets of the collection. Over the decade, we have consistently added about 2,000 new volumes per year.

Prior to FY02, the MBLC required that public libraries serving communities with fewer than 5,000 inhabitants spend a minimum of 20% of their total operating budget on their collections, one of several standards to be met in order to obtain library certification. The certification program is designed to provide incentives to library leaders and municipal officials to support their local collections, and participate in resource sharing and "open door" library policies by monitoring a level of local contribution to the region's available resources. It is an effective program that has sustained Massachusetts libraries during difficult economies, and is largely responsible for the history of increased appropriation of dollars from the Town for the Sherborn Library's resources. Beginning in FY02, the MBLC instituted an application for leniency program, so that libraries in our population group who were functioning at a much higher level of output than other communities our size could apply those strengths to meeting the minimal standards formula. The Sherborn Library functions at high level of hours open to the public that matches community libraries 3-times our size. The Sherborn Library chose to apply for leniency and reduce its commitment of 20% to the collection to 16%, and that reduction is responsible for the declines in the annual collection expenditure on the chart. At the time, the Town was experiencing tighter than usual fiscal constraints, and was struggling to prioritize a program of competitive pay for personnel. The Library applied for leniency of the state standard so that it could direct its resources to the goal of competitive pay for personnel.

But the Library's historic increases for acquiring materials is discounted because of the rising cost of print material. In FY93, the average cost of a hardcover fiction book was \$19.50. In 1999, that cost had risen to \$27.46, and about 25% higher than that amount for hardcover non-fiction. The average rate of growth of .96% for the Library's collection expenditure has been more than consumed by inflation, and has not permitted the Library to actually acquire more titles. For the 11-year span, the buying power of the budget for collections has been stagnant: we have consistently added about 2,000 new titles to the collection each year, including material acquired using interest earned on the endowment fund for such programs, an amount which is

not included in the collection expenditure column. However, access to the Internet continues to enable us to forego many standing orders of expensive print materials in the reference collection, which provides budget flexibility.

The Library has a regular practice in place of discarding materials to make way for new titles in the stacks, but the Building Assessment document shows we will nevertheless need new shelving in the long-range plan. A book was not withdrawn from the collection if it was not widely available in area libraries, regardless of our local use or its physical condition. In the five-year span, the adult print collection has decreased in size by (0.94%), and the juvenile has grown by 2.27%. In the 11-year span, some growth is recognized in the size of both collections, .77% for adult print material and 2.23% for juvenile. With the addition of 2,000 new items each year, the collection would contain more than 66,000 volumes today instead of 53,980 had the Librarians not been vigilant about withdrawing materials in their routine work. Concurrently, the growth of the audio-visual collections soared, because of the introduction of music compact discs and DVDs, and wider availability of audio versions of books. Many of the original videocassettes from the earliest collection lived out their shelf-life in the interim, and were discarded.

Life-Long Learning: Conclusions and Projections on Circulation Trends

- The circulation trends for books and media borrowed from the Sherborn Library show that the community continues to enjoy our collection and that Sherborn makes time for reading. Sherborn citizens value the experience of visiting the facility to browse our collections and mingle with staff and neighbors, and find it convenient from time-to-time to expand their library horizons by visiting neighboring libraries or using remote, online access to the Minuteman Library Network. New innovative programs at the Pine Hill Elementary School that focus on improving reading skills will continue to make our usage statistics climb. Sherborn will continue to defy the national studies on the decline of reading.
- The Sherborn Library must provide a streamlined, state-of-the art method to facilitate resource sharing for its patrons. As the smallest municipality in MetroWest, it is not likely that future revenues for Town services will keep up with inflation and the rising expectations of patrons for their libraries as the next generation steps up. The demographic projections for Sherborn do not show any growth in the population or revenue stream. "Customer loyalty" has always been part of our Library's foundation, but it has been our efficiency and results-driven customer service that helped build our patron base. We already see that convenience and speed are precious commodities in which modern families and busy professionals will invest. The Sherborn Library must guard against losing its customer base to the Minuteman Network libraries, and the risk that Network Transfers will replace interlibrary loan. Network membership will be studied to implement as part of the cost of the building renovation, or sooner if EOSi's next generation of software no longer meets our needs. Should we opt to join MLN, then the projected use of the Library's collections will increase to an even higher degree. It is likely our circulation figure would then be similar to those reported by Dover and Carlisle.
- The Sherborn Library awaits with great anticipation the Board of Library Commissioners' expansion of the state-wide Virtual Catalog. We have thought of it as a great equalizer in the sense that its deployment of the Z39.50 protocol for open systems would enable disparate computer systems across the state to be researched using a single interface. Opportunities for the citizens of Massachusetts to expand their life-long learning opportunities will increase multifold when the Virtual Catalog takes precedence.

We have developed the appended charts on usage with the purpose in mind that, although they are limited to measuring growth and expansion of service based on a factor of items checked-out, they justify the furtherance of a professional evaluation to improve the facility to financially support activity. The depth of this analysis I have provided for the figures are to provide the non Librarian with an understanding of the work the Library staff has done to adapt services, resources, and finances to the dramatic changes occurring on the cusp of two centuries.

8. OUR MISSION – OPPORTUNITIES FOR CULTURAL ADVANCEMENT

This dimension of the Library's mission embodies all other facets of the mission. Certainly all of the components discussed above are culminated in citizens' cultural betterment, leading to their personal ability to contribute to society through family, work, charity, education, government, community, and leisure activities in the time they are given to live.

The Friends of the Sherborn Library are the chief supporters of the Library's cultural aspects. Membership in 13 area museums are costly investments for the size of our Town, but are highly valued programs, as per the results of the 2004 survey. Use of the museum passes are free with the exception of use of the Children's Museum, for which the Library asks for its own \$5 co-pay.

In addition to borrowing museum passes, patrons value the art exhibits and display case exhibits which the Friends organize and arrange. A new program was begun in 2006 that features a donated piece of art from the exhibitors' collection currently on display that is put up for raffle. The revenues from the raffle go directly to the Friends, and so far the program has been a success.

In Fiscal year 2006, the Library arranged 68 programs for children with a total attendance of 1,689, and 10 programs for adults and teens with a total attendance of 209. That represents 50% of our total patron registration attending all programs. The array of programs we offer are supported and organized by the Friends, or funded by the Friends for the Library staff to organize. The Friends of the Library and Library staff work together to develop programs for the public.

Goals to Support Cultural Advancement:

- Work with the Friends to develop an annual budget allocated to program areas, based on past expenditures and current costs.
Timeline: Fall 2006
- Work with the Friends to better publicize events and exhibits with longer lead time running in the local paper, signage displayed, website news, and mailings.
Timeline: Fall 2006
- Implement a training program to assist patrons with use of MP3 player equipment for accessing the netLibrary audio download service.
Timeline: Spring 2007
- Identify programs of interest to teens and strengthen the nature and meaningfulness of their community service projects.
Timeline: 2007-2008
- Develop exhibit and display space for meet children's interests. As there is currently no available space for additional furnishings, this feature may be included in the building renovation project.
Timeline: Concurrent with a renovation

This concludes the outline of goals we have identified as integral to the Library's success in carrying out its mission over the next five years. The following section describes the existing technology infrastructure and a plan to address its future.

TECHNOLOGY

Electronic and Electric Infrastructure Diagram

A diagram illustrating the topography of the Library's existing local area network appends this section.

Computer technology: The Library's latest hardware and system upgrade was implemented in March 2005. The entire system was upgraded with funding provided by the Friends of the Library. In addition, the server software, operating system, and office software were brought up to date. A complete inventory of the system appends this document.

At the time of the installation the Board of Trustees and staff entered into an interesting debate as to whether or not it was more of a streamlined approach, and more practical, to upgrade the entire system every half-decade or so, as a semi-capital project, or to acquire one new PC every year on the Town's operating budget for equipment purchases. The Town Advisory Committee was also brought into this discussion. The main questions were: (1) should the Friends be expected to own this expense, as they have already funded the initial implementation of automation plus two upgrades since then, particularly if they are helping to fund other substantial matters; (2) in dealing with issues of compatibility and rapid obsolescence, will the performance of the system be compromised by running a combination of brand-new, up-to-date PCs in tandem with older, out-of-date PCs; (3) if the life-expectancy of a PC is about 5 years, would the laddering-up approach be pointless if 5 of 10 PCs require replacement in 5 years because they no longer operate/cooperate; (4) is there value and stability of the performance of the system in having a level playing field of equipment; (5) is more repetitive time spent bidding, shopping, and paying for installation and integration of a new PC every year; (6) do we get a better price and more interest from vendors by acquiring an entirely new network every half-decade. If the answer to all of these is "yes," then the Trustees, Friends, and staff have to identify and earmark a source of a large sum of money to every 5 years to outlay for a new network.

Any expansion of the physical cabling and data outlets to add another workstation to the LAN presents a challenge because the floors are baffled concrete and the walls are brick. The installation of a new outlet or feeding a cable to a new location requires heavy equipment. For this reason the Library was relieved to add a wireless network component that permits Internet searching on the Mezzanine level and at other locations throughout the building. The PCs are on their own circuit breaker panel, however, with room to expand. The 10 base T hub, server, and broadband network modem are located in a closet in the Library Director's office. The LinkSys wireless transmitter is located on the Mezzanine above one of the study carrels.

The Library's LAN is remarkably stable, and the annual software support fee to EOS International includes quarterly upgrades, including enhancements requested by the vote of its clients' user group. The annual contract also included unlimited 24/7 online and phone support, as well as a technical support direct dial-in option for performing diagnostics. The Library and the community has greatly benefited by the local cable company's Library Connections Partnership to offer free broadband access to the Internet. All of the workstations on the LAN

have full Internet access through the broadband network. Comcast also provides space on their server (10G) for the Library to mount its website, and a mailform program that enables the Library to run its homegrown "Sherborn Connects," a link from our website that offers patrons the convenience of requesting/renewing books online from their home computer. Comcast also provides multiple email addresses which are assigned to each of the professional staff members and one general Library address.

The Library participates in MassCat and is not a member of the Minuteman Library Network. We are the only public library in the MLN MetroWest jurisdiction that is not part of a wide area network, and we are rapidly becoming one of the few public libraries in Massachusetts that is not in some way affiliated with a WAN. More information on the pros and cons of our status is described in the circulation and services section of the document. The shortcomings of our Library's presence on MassCat are also described, as MassCat is not on the Mass. Board of Library Commissioners' innovative Virtual Catalog. However, recent communications indicate bringing MassCat on board the VC is planned.

Public Computers: The topography of the public access workstations was carefully thought out. They are in proximity to the Reference Librarian's desk for supervision and to request training or assistance. The bank of 4 public access workstations can also be overseen by the Circulation Desk attendant. They are near the Children's Area to encourage children and their caregivers to research the collection or the Internet, as the Children's Area does not have its own workstations because of space limitations. The cluster of workstations is buffered from the adult reading area by the new books display and periodical shelves to preserve a distraction-free quiet reading area.

There is one non-networked PC on the Mezzanine at a computer table that allows patrons to perform word processing, spreadsheets, presentations, and a few self-guided tutorials. All the software is up-to-date and it has a laser printer connected. This PC is not online, and is rarely in use.

The Library's technology services have taken on a life of their own by providing a destination for people to check their email and explore the Internet. The Library does not have a sign-in policy but has posted signage to request that patrons limit their use to one hour, and that users may be asked to log out if someone else is waiting. The Library has a notice it hands to patrons who we must ask to move along. One of the 4 workstations has a notice posted that it should be consulted for collection searching only, to make it available for quick title checks.

As the accompanying technology inventory shows, there are printers connected to each workstation including a color laser printer that is networked to all the workstations in the Library. The Library suggests a strictly voluntary minimum donation for printing jobs, which helps offset the cost of the ink cartridges.

The community's interest in technology services at the Library was glimpsed in the 2004 survey. The survey form, which appends this document, tried to gauge the public's appetite for future innovative Library technology and services. Patrons expressed their high interest in visiting our website to search the collection from home and to use "Sherborn Connects" to request or reserve materials, mainly because we are not part of Minuteman and they would like to have a way to do this online. Most were unaware of our website and collection link to MassCat, and enthused that they would give it a go. They are highly interested in having our Library join the Minuteman Library Network. Many of those who appeared to be best acquainted with the Minuteman Network services were not interested in any substitutes or

attempts at emulation. In summary, patrons seemed more interested in having us participate in technology services that they have become acquainted with in their use of other libraries. They had little or no interest in anything innovative because they feel we need to catch up with area libraries by joining the Minuteman Network.

Parents who visit area libraries with their children make note of the age-appropriate technology available to them in the children's rooms. The Sherborn Library does not offer workstations and equipment in the Children's Area because of the lack of physical space. The Library Trustees who visited the children's rooms of area libraries also recognized that workstations and equipment set up exclusively with children's interests in mind have become a public library standard.

Staff Computers: The Library has 7 staff computers. The Circulation Desk has 2 computers, the Technical Services Office has 2 computers, the Public Services Librarian has 1 computer, the Children's Librarian has 1 computer, and the Library Director has 1 computer. These are certainly sufficient for our current level of staffing. The Technical Services staff is part-time and there is time available in that office every afternoon and all day on Fridays where PCs are not in use. If public services professional staff wish to work behind the scenes, in an area where they will not be interrupted, they can use the Technical Services Office. Also, we have those 2 PCs available to assign special projects to volunteers.

TECHNOLOGY INVENTORY

The Library information technology network consists of public and staff workstations, a broadband router connecting to the internet, a data switch, server, and wireless access point, all interconnected by Cat 5 coaxial cable.

The Library automation software is provided by EOS International. Descriptions of their library software are available at <http://www.eosintl.com>.

The Library's website is at <http://home.comcast.net/~sherbornlibrary>. This website provides a variety of content regarding its services, programs, schedules, staff, and online access to the library catalog. A mail form on the website is provided for library patrons to order or renew materials from the library's collection.

1. Library Information Management System

In February 2000 the library upgraded its library information management software to the EOS *Q Series* version.

The EOS upgrade involved purchase of *Q Series* software from EOS, purchase of a new file server, and installation, staff training and testing of the system.

1.1 Software

The EOS software packages included the following modules:

- Q Series Cataloging Module
- Q Series Circulation Module
- Q Series OPAC (Online Public Access Catalog)

- Q Series @ccess (Web OPAC) - Q@ccess enables the library to put the Q Series OPAC on the internet. (This feature has not been implemented since it duplicates the functions available via the MassCat Union Catalog)
- Database access software (MS SQL) and user licenses

The server also contains Symantec pcAnywhere 11.5 software to permit EOS to make remote fixes or upgrades to the software.

1.2 EOS Server

The EOS server is a Dell two-processor computer with the following technical configuration:

Base Unit	PowerEdge 1600SC
Base unit cpu	2.4 GHz/512K 533MHz FSB Xeon
Second cpu	2.4 GHz/512K 533MHz FSB Xeon
Memory	2 GB, DDR SDRAM 266 MHz (2x1GB)
Hard Drive	Two 73 GB 10K RPM U320 68 pin SCSI HDD
Hard Drive Controller	PERC4-SC 64MB 1 Internal Channel
Optical Drive	48X CD-ROM EIDE Half Height
Floppy Drive	3.5" 1.44MB Floppy Drive
Tape Backup	PowerVault 100T, IDE, 20/40GB Internal
Keyboard	USB Keyboard
Mouse	USB Optical Mouse w/scroll
Operating System	Windows 2003 Server Std Edition and 15 CALs
Display	None
Back up battery	APC Smart UPS 1500 with PowerChute

The server is located in the Library Director's office.

One of the two 73 GByte hard drives contains the Server and EOS software, the other contains the library database.

2. Workstation Computers

In February 2005 the library computer network was upgraded with the purchase of eleven Dell Optiplex GX 280 workstations and a Dell PowerEdge 1600 SC Server. All workstations run Windows XP and the Microsoft Office software. The upgrade was completed on March 1, 2005.

The 11 Dell workstation computers purchased in February all have the following technical configuration:

Base Unit	Optiplex GX280, Pentium 4 2.8GHz 1M, 800FSB
Memory	512MB, Non-ECC, 400MHz DDR2 (2x256)
Hard Drive	40GB SATA 7200RPM
Optical Drive	48X32 CDRW/DVD Combo Drive with DVD Playback
Floppy Drive	3.5" 1.44MB Floppy Drive
Keyboard	USB Keyboard
Mouse	USB Optical Mouse w/scroll
Operating System	Windows XP Professional SP1
Display	Dell E173FP 17" Flat Panel Display

All 11 workstations are equipped with the Microsoft Office Pro 2003 software, and are connected to the library LAN and internet. An HP Color LaserJet 2600n printer is also connected to the LAN so that all workstations have access to a color printer. All workstations are powered from a separate circuit panel incorporating protection against power surges.

The allocation of the 11 new workstations is as follows:

2.1 Public Access Workstations

Four of the workstations are available in the computer area on the main level for public access to the library information system. All four workstations have access to the internet and to the server for the Q-Series OPAC software for catalog search.

Two HP Deskjet 6450 color printers are each dedicated to two of the workstations. All four have access to the HP Color LaserJet 2600n printer.

Each of the public access workstations has Fortres Grand 101 desktop security software to prevent users from making changes to computer settings. Users can access only authorized programs and are prohibited from saving to the hard drive.

Access to the public access computers is limited to one hour per individual although the rule is not enforced if there are idle workstations available.

Based on the 54 hours the Library is open to the public over 6 days a week, the approximate public access computer utilization in an average week is:

- No computers in use: 5 hours
- One computer in use: 5 "
- Two computers in use: 10 "
- Three computers in use: 24 "
- Four computers in use: 10 "

One of the 4 PCs is reserved for quick catalog checks, but exception is occasionally made to assist patrons with short sessions of Internet searching or email checks.

2.2 Technical Services Computers

Two workstations are assigned to the technical services room in which they are located.

Functions performed are:

- Online cataloging
- Library database research
- Internet search and email
- Spreadsheet applications for statistics

An HP LaserJet 1100A is shared between the two workstations. Each workstation has a barcode scanner. Both workstations are connected to the library LAN and to the internet.

2.3 Children's Librarian

One workstation is assigned to the Children's Librarian. Functions performed on this computer are:

- Word Processing via MS Word 2003
- Spreadsheets using MS Excel 2003
- Web page creation using MS FrontPage 2003
- Document generation using MS Publisher 2003
- Library database research
- Graphics via various applications
- Internet and email

Peripheral equipment associated with this computer includes:

- HP Deskjet 6122 color printer
- Barcode scanner

This computer is connected to the library LAN and to the internet.

2.4 Public Services Librarian

One workstation is assigned to the Public Services Librarian. Functions performed on this computer are:

- Word processing using MS Word 2003
- Spreadsheets using MS Excel 2003
- Library website maintenance using MS FrontPage 2003
- Document generation using MS Publisher 2003
- Graphics via various applications
- Library database research
- Responding to MailForm service requests.
- Internet and email

Peripheral equipment associated with this computer includes:

- HP LaserJet 1100A printer

This computer is connected to the library LAN and to the internet, and is located in the Reference area.

2.5 Library Director

One workstation is assigned to the Library Director. Functions performed on this computer are:

- Word processing using MS Word 2003
- Spreadsheets using MS Excel 2003
- Library website maintenance using MS FrontPage 2003
- Document generation using MS Publisher 2003
- Graphics via various applications
- Library database search
- Online acquisitions of library books and audio/visual material
- Internet search and email

Peripheral equipment associated with this workstation includes:

- HP LaserJet 1100A printer.
- HP ScanJet 4600 Flatbed scanner

This workstation is located in the Library Director's office and is connected to the library LAN and to the internet.

2.6 Circulation Desk

Two workstations are assigned to the circulation desk. Functions performed are:

- Check-in/check-out library materials
- Catalog searches
- Internet searches

Peripheral equipment associated with these computers includes:

- One HP Deskjet 6122 printer accessible from each circulation desk workstation.
- Barcode scanners connected to each workstation

Each of these computers is connected to the library LAN and to the internet.

These computers and peripherals are housed in the Circulation Desk

3. Broadband Router

The Broadband Router is a Linksys Instant Broadband EtherFast Cable/DSL Firewall Router with 4-Port Switch/VPN Endpoint, model BEFSX41. The router provides access to the internet for both the library LAN and laptops via the Wireless Access Point. The router provides protection against a number of DoS (Denial of Service) attacks, and contains an advanced Stateful Packet Inspection firewall for enhanced protection against intruders from the internet.

The BEFSX41 router can be administered and upgraded remotely over the internet.

4. Data Switch

The data switch is an Allied Telesyn CentreCom 16-port unmanaged Ethernet switch, model AT-FS716L-10. The switch architecture is non-blocking, and the ports are auto-negotiating to permit attached devices to automatically configure for the best possible performance.

5. WiFi

A WiFi wireless access point permits local wireless public/staff laptop access to the libraries information network services, and to the internet. The WiFi facility became operational in September 2005.

The WiFi access is implemented with the LINKSYS WAP55AG Dual-Band Wireless A+G Access Point product

New Symantec Norton 2004 AntiVirus software with automatic updates was purchased to provide appropriate security protection.

6. Miscellaneous

6.1 Theater Projector

A portable NEC VT 660 LCD 1700 lumen projector is provided for use in the Library and for making Library presentations. It can be controlled from a laptop computer with MS PowerPoint software. In May 2006, the Library received a grant to acquire and install a ceiling-mounted NEC LT 35 for the Theater that is integrated with a DVD/VCR combo player and wall plate for wide-screen Internet and laptop presentations.

6.2 Staff Laptop

An ACER Travelmate 2502 LMI laptop is available for staff use and use with the theater projector.

Hardware configuration:

- CPU Pentium 4 processor
- Hard Disk 40 GByte
- CD Drive CDRW/DVD Combo
- RAM 512 MByte
- Monitor 14.1 XGA TFT
- Interface, direct Fast Ethernet and 56K fax/modem
- Interface, wireless Bluetooth and IEEE 802.11g wireless LAN, wireless LAN card
- Operating System Windows XP Professional

The Travelmate software includes Microsoft Office Pro 2003, and MS PowerPoint 2003.

6.3 Public Workstation

A workstation using an old 1999 PONY desktop is provided for public use on the upper level of the library outside of the conference room.

Hardware configuration:

- System Generic
- CPU x86 Family
- Floppy Drive Generic NEC Floppy Disk
- Hard Disk 20 GByte WDC WD20 5BA
- CD Drive 52x LITEON CD_ROM LTN526S
- RAM 63 MByte
- Monitor AcerView 56e
- Printer HP DeskJet 6122

Software:

- MS Windows 98 Second Edition
- MS PowerPoint, 2002
- MS Excel 2002
- MS Word, 2002
- MS Access, 2000

- MS Outlook, 2002
- MS Internet Explorer
- MS Office XP Pro

The workstation is not connected to the internet or the library LAN.

The workstation utilization is low - probably because of its out-of-the way location. It can provide a useful service for library patrons who have occasional need for the special software packages it contains.

6.4 Battery Power Backup

An APC battery power backup with automatic switchover is provided for both the EOS file server. In case primary power is lost the server will be switched to the battery source and a controlled power shutdown procedure will be executed. The APC Smart UPS 1500 battery and PowerChute shutdown software have been upgraded.

7. Technology Plan - Future Needs

7.1 Q Series Obsolescence

Beginning in 2005, EOS began directing all its research and development in a new product, EOS.Web. It is likely within the next two years that EOS will discontinue supporting the Q Series. Most of EOS Q Series customers have migrated to EOS.Web. The largest client base in EOS is corporate and special libraries. The Sherborn Library should concurrently evaluate migration to EOS.Web with membership in the Minuteman Library Network. The community has expressed strong interest in the Library's participation in the Minuteman Network. The Sherborn Library is the only public Library in Eastern Massachusetts that is not a member of a network consortium. The lack of participation may have implications on the services the community receives in the future. Migration to EOS.Web should be studied carefully, as it includes Web hosting services out of the EOS San Diego office, and may not be compatible with the Library's technology endeavors.

7.2 Children's Room Workstations

Workstations with children's oriented software will need to be provided in the Children's Room. These workstations will be connected to the internet through appropriate filters. Connections to the OPAC will also be required.

7.3 Workstation Networking

The original library design preceded the information technology revolution and hence did not provide for the cable and power distribution and outlets that are necessary to support workstations and networking. Consequently, installation of the infrastructure supporting the library information system was difficult and expensive, and the resulting configuration is essentially fixed in place.

Within the next few years fiber-optic cable will become the dominant communications technology and the existing library Ethernet system will become obsolete and may have to be replaced. The library space study should consider various methods of implementing the library LAN and recommend approaches that will provide flexibility without detracting from the overall ambiance and appearance of the library.

7.4 Library Connection to Town Hall LAN

A connection between the library and the Town Hall LAN should be implemented to permit interchange of documents and data.

7.5 Facilities for Digitization of Historical Records

Space and workstation facilities is recommended for digitization and archiving of records and images of historical value to Sherborn, including

- Library rare books, documents, and images
- Sherborn Historical Society collection
- Sherborn Historical Commission records
- Town Hall vital statistics and other records
- Church historical documents and records

Access to the digitized, archived records should be provided via the library LAN and CDs. Secure and distributed storage of both original and digitized records should be provided. Off-site storage of copies digitized records should also be provided to prevent loss of original and digitized records due to a single catastrophic event.

APPENDICES

- A. Sherborn Library Local Area Network (LAN) Diagram
- B. Circulation Trends FY1995-2005
- C. Circulation Trends and Holdings Chart
- D. MetroWest Comparable Towns Chart
- E. MetroWest Comparable Towns by Per Capita Operating Expenditures - Graph
- F. MetroWest Comparable Towns Per Capita – Chart
- G. MetroWest Comparable Towns by Full-Time Equivalent – Graph
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- I. Massachusetts Smalls – all-State in Sherborn Population Group – Graph
- J. Sample of 2004 Survey Form