

MOBIUS

Annual Report

FY 2014-2015

TABLE OF CONTENTS

DIRECTOR'S REPORT 3

COLLECTION MANAGEMENT TASK FORCE BOARD RECOMMENDATIONS
VIRTUAL CHAT REFERENCE PARTICIPANTS
IUG CONFERENCE SCHOLARSHIP

YEAR IN REVIEW 6

STATISTICS 8

BORROWING AND LENDING
HELP DESK

MISSOURI EVERGREEN 12

MISSOURI EVERGREEN MEMBER LIBRARIES
UPCOMING LAUNCHES
MISSOURI EVERGREEN HELP DESK STATISTICS

“When you're surrounded by people who share a passionate commitment around a common purpose, anything is possible.”

-Howard Schultz

DIRECTOR'S REPORT

Our member's commitment to the future of MOBIUS was never more obvious than last year. A total of seven task forces were formed to help with planning for our future. Task force members contributed a lot of their time planning and strategizing about expanding and improving services to our libraries. We brainstormed, researched, and debated issues affecting all of our libraries and what role MOBIUS could play in each.

The Collection Management Task Force explored collaborative activities and strategies that would advance the collection management goals of MOBIUS member libraries. Many ideas were

discussed and a final recommendation for further investigation on specific projects was made to the Board of Directors.

The INN-Reach Catalog Best Practices Task Force was charged with creating a best practices document to guide the addition of records into the MOBIUS Union Catalog. The task force agreed to recommend that the union catalog be considered a discovery tool and to encourage member libraries to contribute all types of bibliographic records. A best practices document was written to reflect when and how items should be contributed.

The Virtual Chat Reference

Task Force explored and assessed various opportunities for consortium-wide participation in a virtual chat reference tool. ChatStaff and LibraryH3lp were the vendors of choice. So far, eleven libraries have participated in this new service. (Details on following page)

The Training Task Force explored and assessed the various training opportunities and issues available to MOBIUS members. After surveying the membership and investigating other training offerings, the task force recommended that MOBIUS continue concentrating all training on the ILS since there are a number of organizations already offering many

ANNUAL REPORT (CONTINUED)

“Last year our member libraries saved \$3,293,940 by subscribing to e-resources through MOBIUS.”

different types of training.

The INN-Reach Circulation Policies Task Force reviewed the current MOBIUS circulation policies and procedures. The task force recommended that the checkout period for MOBIUS items be increased from 3 weeks to 4 weeks. Renewals were kept at 2 and the timing of notices was adjusted to match the new checkout period. The task force also reviewed processing materials and did not recommend any changes.

The MOBIUS Strategic Planning Task Force 2015-2018 reviewed the 2012-2015 plan as a guide to help plan for the next three years. A new plan was adopted by the Board which included recommendations of the task forces and continuing previous plan agendas.

The Governance Task Force

explored possible revisions to the bylaws, the governance structure of MOBIUS and the advisory group structure. The task force recommended the dissolution of all advisory groups and created Board committees that included 5 member representatives, a Board member, a MOBIUS Office employee and the MOBIUS Executive Director. Four new committees were formed: User Experience & Metadata Committee, Circulation & Courier Committee, ILS Marketplace Committee, and the E-Resources Committee.

New discussion lists were created for each committee/topic and all member library staff were invited to join and participate. The membership of the Board was revised to allow the inclusion of any voting member and not only Directors. No changes were made to the bylaws.

BOARD OF DIRECTORS

STEPHANIE DECLUE
President

LAURIE HATHMAN
Vice-President

WENDY McGRANE
Treasurer

MOLLIE DINWIDDIE
Secretary

CYNTHIA DUDENHOFFER
Past President

EDWARD WALTON
At-Large Member

TOM PETERS
At-Large Member

SHARON McCASLIN
At-Large Member

BONNIE POSTLETHWAITE
At-Large Member

FRAN STUMPF
At-Large Member

MICHAEL DAVIS
Public Library Representative

BARBARA READING
Missouri State Librarian

DONNA BACON
MOBIUS Executive Director

COLLECTION MANAGEMENT TASK FORCE BOARD RECOMMENDATIONS

- Collaborative Management of Few/Last Copies of Printed Materials
- Collaborative Physical Storage of Printed Monographs, Journal Runs, and Series
- Consortial DDA and eBook Sharing
- Regional Institutional/Consortial Repository
- Consortial eResource Agreements
- Usage Assessment of MOBIUS collections
- Pursue additional interconsortial agreements, when mutually beneficial

VIRTUAL CHAT REFERENCE PARTICIPANTS

- Central Methodist University
- Concordia Seminary
- Cottey College
- East Central College
- Fontbonne University
- Kansas City Art Institute
- Northwest Missouri State University
- Southeast Missouri State University
- Southwest Baptist University
- Stephens College
- Webster University / Eden Theological Seminary

IUG CONFERENCE SCHOLARSHIP

The third annual IUG conference scholarship recipient was Laura Kromer, Technician II from the Missouri State Library. Congratulations, Laura!

REVENUES & EXPENSES

	FY2012-2013	FY2013-2014	FY2014-2015
REVENUES	\$5,437,521	\$6,346,502	\$6,916,092
EXPENSES	\$5,334,255	\$6,335,925	\$6,803,061

YEAR IN REVIEW

One of our biggest projects this year was the creation of a RFP for courier service. A committee was formed to assist the MOBIUS Office with the process. We reviewed the prospective applicants, listened to presentations by each, and finally chose to recommend to the Board of Directors a switch to a new courier, STAT Courier, out of St. Louis, MO. STAT brought new ideas and for the first time for us, the capability to scan and track materials as they moved through the system. The contract with STAT began on July 1, 2015.

We added our first new cluster since MOBIUS was formed. Explore includes the Missouri History Museum, the Missouri Botanical Garden, the St. Louis Art Museum and Goldfarb School of Nursing at Barnes Jewish College. These four libraries were previously sharing a Millennium system before they became the Explore cluster and migrated to Sierra on March 17, 2015. They went live with INN-Reach on April 1, 2015. We are excited to have Explore as our new cluster and welcome each of these libraries to the MOBIUS family.

MOBIUS welcomed a new staff person this year. Sharla Lair left MOBIUS in 2015 and Christina Virden replaced her as our new Eresources Coordinator in August 2015. Christina was previously at MU-Ellis Library.

MOBIUS was proud to add new member libraries this past fiscal year. Tulsa City-County Library became our first out-of-state member and has quickly become one of our top net lenders. They went live on July 15, 2014. The Kansas City Cluster welcomed Park University as a new member on February 26, 2015.

For the first time, MOBIUS lost a member library. Forest Institute of Professional Psychology in Springfield, MO closed its doors in the Summer of 2015. We assisted the library in any way we could as they went through this unfortunate process. We wish the staff at Forest the best of luck.

Our new partnership with the Colorado Alliance of Research Libraries (Prospector) began on August 4, 2014. MOBIUS and Prospector are using the Peer-to-Peer software from Innovative Interfaces to connect our INN-Reach systems together for the purpose of resource sharing. We are the first consortia to connect our systems together across state lines. In our first year, we shared almost 10,000 materials.

MOBIUS migrated MERLIN from Millennium to Sierra on May 27, 2015. This was our last cluster to migrate to Sierra.

MOBIUS held our annual conference on June 1-3, in Columbia, MO. We had a record attendance of 314 and 16 vendors. We welcomed 4 keynote speakers this year—Kimberly Sweetman, Library Consultant and Leadership Development Coach, Kimberly Sweetman Consulting; Bonnie Tijerina, Data & Society Fellow, Data & Society Institute of New York City; Char Booth, Director of Research, Teaching and Learning Services, Claremont Colleges Library; and Jason Griffey, Founder and Principal Consultant, Evenly Distributed. As usual, our member libraries shared their expertise and experiences with the attendees by offering multiple sessions on a variety of topics. It was one of our most successful conferences to date.

The Kansas State Library invited MOBIUS to participate in a new multi-state ebook program being sponsored by COSLA (Chief Officers of State Library Agencies). The COSLA Ebook Program required the purchase of 15 titles from Sage by each participating state. Each state would then have access to each other's purchased ebooks. The MOBIUS Board of Directors voted to fund and participate in this new program. Our new contract started on January 1, 2015 and gave our member libraries access to about 75 titles.

On July 1, 2015, MOBIUS began a new partnership with the Kansas State Library. We are now hosting and managing their library's Evergreen ILS. We are looking forward to this new partnership as we move forward in the next fiscal year.

This was a very busy year for all of us, especially for the MOBIUS staff who worked hard implementing new libraries, keeping up with Help Desk tickets, training our member library staff, implementing new services and generally advocating on your behalf in all possible ways. They are a dedicated group of people who truly care about our organization.

I would also like to thank all of our member libraries who have participated in MOBIUS task forces and committees in the last year. Your contributions and dedication are what make MOBIUS so successful.

-- Donna Bacon

STATISTICS

BORROWING AND LENDING

UNIQUE TITLES (BIB RECORDS)

	FY2012-2013	FY2013-2014	FY2014-2015
UNIQUE TITLES (OWNED BY A SINGLE LIBRARY)	7,388,179	7,174,263	7,345,385
NON-UNIQUE	3,171,542	3,404,279	3,640,758
TOTAL TITLES	10,559,721	10,578,542	10,986,143
PERCENT UNIQUE	70.0%	67.8%	66.9%

TOP BORROWERS MOBIUS UNION CATALOG

SPRINGFIELD-GREENE COUNTY LIBRARY	26,735
WASHINGTON UNIVERSITY	15,857
TULSA CITY-COUNTY LIBRARY	13,314
SAINT LOUIS UNIVERSITY	8,691
CHRISTIAN COUNTY LIBRARY	6,486

PROSPECTOR BORROWING & LENDING

PROSPECTOR	FY2014-2015
MOBIUS BORROWS	5,204
MOBIUS LENDS	4,638

TOP BORROWERS UNION CATALOG & INTRA-CLUSTER

SPRINGFIELD-GREENE COUNTY LIBRARY	26,735
WASHINGTON UNIVERSITY	15,857
UNIVERSITY OF MISSOURI - COLUMBIA	14,891
TULSA CITY-COUNTY LIBRARY	13,314
SAINT LOUIS UNIVERSITY	8,691

3 YEAR BORROWING

	INTRA-CLUSTER BORROWING	MOBIUS BORROWING	TOTAL BORROWING
FY 2012-2013	52,522	133,340	185,862
FY2013-2014	43,913	132,099	176,012
FY2014-2015	39,114	138,467	177,581

TOP LENDERS MOBIUS UNION CATALOG

TULSA CITY-COUNTY LIBRARY	13,944
UNIVERSITY OF MISSOURI - COLUMBIA	13,458
SPRINGFIELD-GREENE COUNTY LIBRARY	13,074
WASHINGTON UNIVERSITY	10,438
UNIVERSITY OF MISSOURI KANSAS CITY	7,526

INN-REACH ITEM COUNT (TOTAL HOLDINGS)

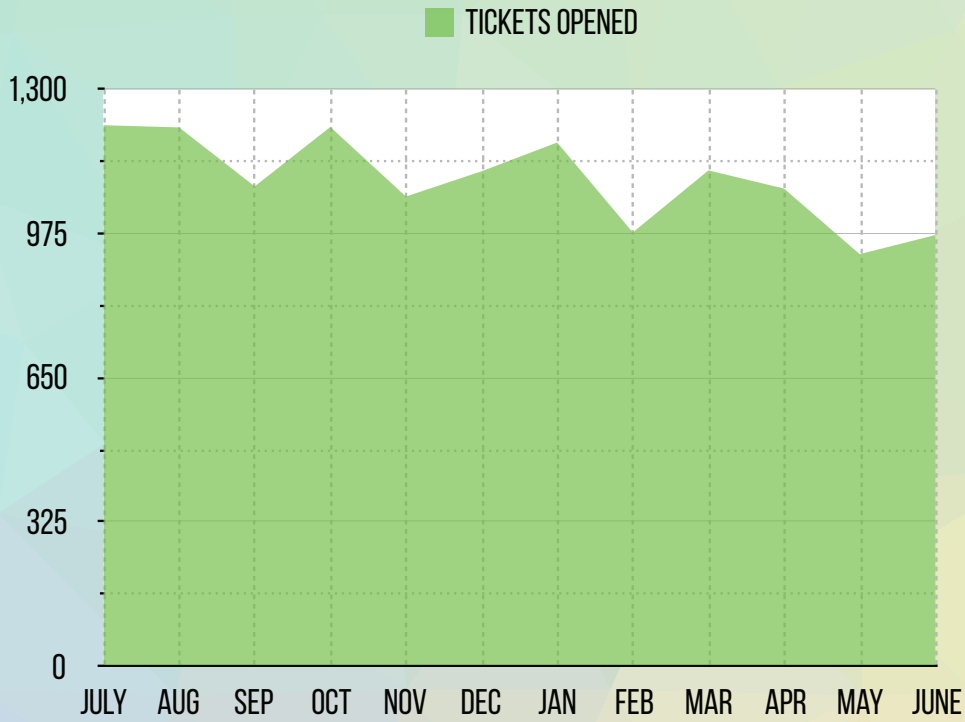
FY2012-2013	26,182,001
FY2013-2014	27,680,897
FY2014-2015	27,581,259

TOP LENDERS UNION CATALOG & INTRA-CLUSTER

UNIVERSITY OF MISSOURI - COLUMBIA	21,406
TULSA CITY-COUNTY LIBRARY	13,944
SPRINGFIELD-GREENE COUNTY LIBRARY	13,074
UNIVERSITY OF MISSOURI KANSAS CITY	12,279
WASHINGTON UNIVERSITY	10,438

STATISTICS

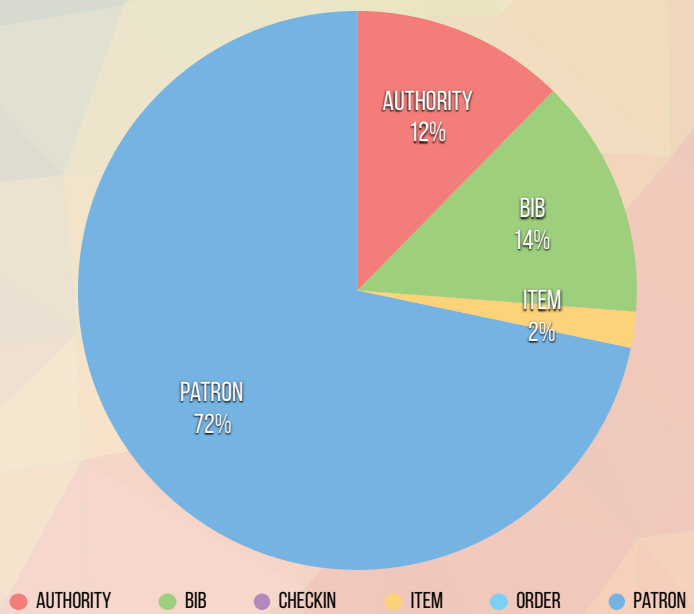
HELP DESK



RECORDS LOADED BY TYPE

RECORD TYPE	RECORD COUNT
AUTHORITY	11,524,510
BIB	12,919,141
CHECKIN	8,829
ITEM	1,946,616
ORDER	10,096
PATRON	66,902,905
TOTAL	93,312,097

RECORD LOADS BY TYPE



TICKET BREAKDOWN BY INSTITUTION

INSTITUTION	TOTAL TICKETS OPENED
A.T. STILL UNIVERSITY	27
AVILA UNIVERSITY	53
BAPTIST BIBLE COLLEGE	20
CAMDEN COUNTY LIBRARY	1
CENTRAL METHODIST UNIVERSITY	18
CHRISTIAN COUNTY LIBRARY	38
COLUMBIA COLLEGE	335
CONCEPTION ABBEY & THEOLOGICAL SEMINARY	15
CONCORDIA SEMINARY	196
COTTEY COLLEGE	65
COVENANT THEOLOGICAL SEMINARY	113
CROWDER COLLEGE	97
CULVER-STOCKTON COLLEGE	60
DRURY UNIVERSITY	280
EAST CENTRAL COLLEGE	119
EVANGEL UNIVERSITY	23
FONTBONNE UNIVERSITY	265
FOREST INSTITUTE OF PROFESSIONAL PSYCHOLOGY	55
GOLDFARB SCHOOL OF NURSING	14
HANNIBAL-LAGRANGE UNIVERSITY	224
HARRIS-STOWE STATE UNIVERSITY	15
JEFFERSON COLLEGE	96
KANSAS CITY ART INSTITUTE	26
KENRICK-GLENNON THEOLOGICAL SEMINARY	9
LINCOLN UNIVERSITY	51
LINDENWOOD UNIVERSITY	573
LOGAN UNIVERSITY	40
MARYVILLE UNIVERSITY OF ST. LOUIS	43
METROPOLITAN COMMUNITY COLLEGE	47
MIDWESTERN BAPTIST THEOLOGICAL SEMINARY	68
MINERAL AREA COLLEGE	60
MISSOURI BAPTIST UNIVERSITY	126
MISSOURI BOTANICAL GARDEN	7
MISSOURI HISTORY MUSEUM	9
MISSOURI RIVER REGIONAL LIBRARY	6
MISSOURI SOUTHERN STATE UNIVERSITY	342

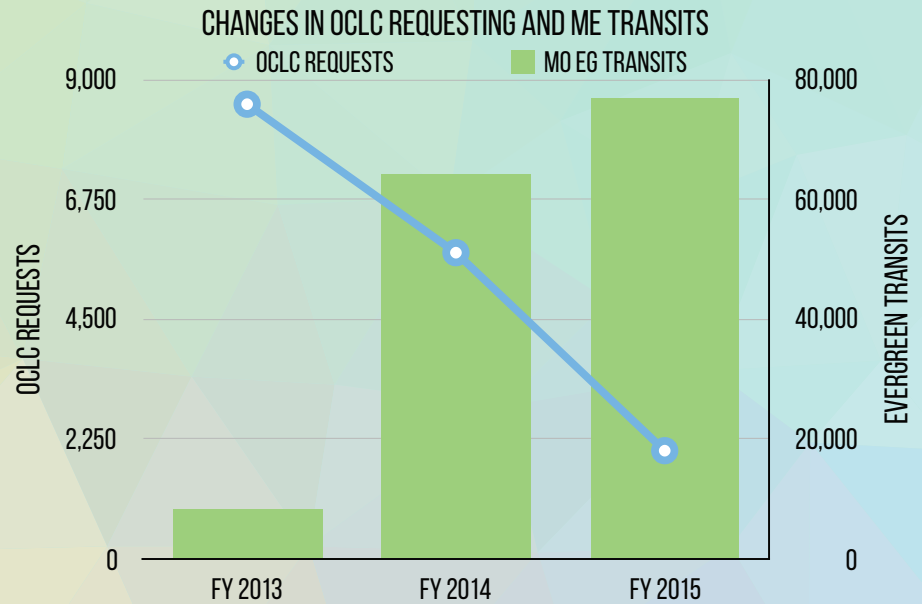
TICKET BREAKDOWN BY INSTITUTION

INSTITUTION	TOTAL TICKETS OPENED
MISSOURI STATE LIBRARY	39
MISSOURI STATE UNIVERSITY	569
MISSOURI UNIVERSITY OF SCIENCE & TECHNOLOGY	929
MISSOURI VALLEY COLLEGE	30
MISSOURI WESTERN STATE UNIVERSITY	326
MOBERLY AREA COMMUNITY COLLEGE	13
NORTH CENTRAL MISSOURI COLLEGE	65
NORTHWEST MISSOURI STATE UNIVERSITY	559
OZARK CHRISTIAN COLLEGE	14
OZARKS TECHNICAL COLLEGE	170
PARK UNIVERSITY	63
ROCKHURST UNIVERSITY	82
SAINT LOUIS UNIVERSITY	29
SAINT PAUL SCHOOL OF THEOLOGY	30
SOUTHEAST MISSOURI STATE UNIVERSITY	347
SOUTHWEST BAPTIST UNIVERSITY	235
SPRINGFIELD-GREENE COUNTY LIBRARY	59
ST CHARLES COMMUNITY COLLEGE	122
ST. LOUIS ART MUSEUM	7
ST. LOUIS COLLEGE OF PHARMACY	30
ST. LOUIS COMMUNITY COLLEGE	169
STATE FAIR COMMUNITY COLLEGE	68
STATE TECHNICAL COLLEGE OF MISSOURI	134
STEPHENS COLLEGE	51
THREE RIVERS COMMUNITY COLLEGE	109
TRUMAN STATE UNIVERSITY	164
TULSA CITY-COUNTY LIBRARY	26
UNIVERSITY OF CENTRAL MISSOURI	195
UNIVERSITY OF MISSOURI - COLUMBIA	1341
UNIVERSITY OF MISSOURI - KANSAS CITY	1003
UNIVERSITY OF MISSOURI - ST LOUIS	750
WASHINGTON UNIVERSITY	38
WEBSTER UNIVERSITY/EDEN THEOLOGICAL SEMINARY	335
WESTMINSTER COLLEGE	71
WILLIAM JEWELL COLLEGE	96
WILLIAM WOODS UNIVERSITY	43

MISSOURI EVERGREEN

“Missouri Evergreen has demonstrated that patron-initiated requests (aka patron direct borrowing) can serve a larger population than traditional interlibrary loan.” -- Report from Missouri State Library

MOBIUS entered another year contract with the Missouri State Library to host and manage the Missouri Evergreen Consortium on September 1, 2014. It was a productive and busy year. Three member libraries of the consortium migrated onto the Evergreen ILS and began resource sharing in FY2015—Marion County Subdistrict #1, Cameron Public, and Willow Springs Public. Ozark Regional Library’s final branch to automate also went live in this fiscal year. Schuyler County Library, which was previously not automated, began the process of adding holdings into Missouri Evergreen for an early FY2016 go-live. Two libraries joined the consortium this year: Cameron Public and Willow Springs Public. As of June 30, 2015, there were 1,430,208 items attached to 980,122 bibliographic records, and the consortium serves 243,506 patrons. MOBIUS’s Missouri Ever-



green staff, Blake Graham-Henderson, Justin Hopkins, and Debbie Luchenbill, received training from the BC Libraries Cooperative on the Acquisition module in Evergreen, in order to work on its implementation for interested Missouri Evergreen libraries. In January, Scenic Regional Library system began using Acquisitions after several months of setup and training.

Missouri Evergreen continued to mature as a consortium, updating policies, re-

2014-2015 EXECUTIVE COMMITTEE

SUE SZOSTAK, CHAIR

Poplar Bluff Municipal Library

STEVE CAMPBELL, VICE-CHAIR

Scenic Regional Library

KAREN HAYDEN, SECRETARY

Little Dixie Regional Libraries

SUE LIGHTFOOT, AT-LARGE

Carrollton Public Library

TERRI YORK, AT-LARGE

Webster County Library

fining bylaws, and defining best practices and workflows. The membership continued to meet monthly, and some of the membership committees continued to meet regularly, others as needed. In coordination with the State Library and the MOBIUS staff, the Executive Committee continued work on strategic and financial planning for the future of the consortium. An informal lunch gathering of Missouri Evergreen members took place at the Missouri Library Association Annual Conference in October 2014. Many members of the consortium also created

and approved reciprocal borrowing agreements for other Missouri Evergreen libraries' patrons. At the end of the year, at the June membership meeting, the results of the consortium vote on two Executive Committee member positions for three-year terms were announced, and the Executive Committee chose new officers for the 2015-2016 fiscal year.

The Cataloging Committee met monthly and continued working with MOBIUS staff on waves of catalog cleanup by format. Blake developed scripts, based on input from

UPCOMING LAUNCHES

- August 2015
Schuyler County Library District
- September 2015
Dulaney Memorial Library
- January 2016
De Soto Public Library
- March 2016
Salem Public Library
- January, 2018
Neosho Newton County Library

MISSOURI EVERGREEN MEMBER LIBRARIES

- Albany Carnegie Library
- Bollinger County Library
- Cameron Public Library
- Carrollton Public Library
- Carthage Public Library
- Caruthersville Public Library
- Doniphan-Ripley County Library
- Grundy County Jewett Norris Library
- Howard County Library
- Lebanon-Laclede County Library
- Little Dixie Regional Libraries
- Marion County Library Subdistrict #1
- Marshall Public Library
- Ozark Regional Library
- Poplar Bluff Public Library
- Scenic Regional Library
- Sikeston Public Library
- Stone County Library
- Sullivan Public Library
- Washington Public Library
- Webb City Public Library
- Webster County Library
- Willow Springs Public Library

MISSOURI EVERGREEN REPORT (CONT.)

the committee, to automate part of the cleanup process. Also, the State Library provided resources to hire a part-time cataloger, based at Scenic Regional Library, to assist in the parts of catalog cleanup that required a person to evaluate. The OPAC Committee met several times and proposed fifteen changes to the look and functionality of the OPAC, which were implemented in November and December. One of the features Blake developed for the OPAC, scrolling carousels, were also popular with the larger Evergreen community.

The technology used by Missouri Evergreen also continued to evolve. We moved from Evergreen version 2.6.1 to 2.7.1 and, by the end of the year, were gearing up to move to 2.8.2. Each of these upgrades included bug fixes and new features contributed by the larger Evergreen community. The database servers' memory was also upgraded to 220GB. Several virtual servers continued to be in use to better test new features, upgrades, and software.

MOBIUS Missouri Evergreen staff performed myriad tasks, including: help desk,

communication with members and potential members, training on new features, at new libraries, and for new directors/staff members, aforementioned technology upgrades, system setup and migrations, upgrades, software development, creating helpful videos, creating and performing a major overhaul of training documentation, administrative tasks, visiting member and potential member libraries, creating or updating report templates, and significant updates to the Missouri Evergreen website. They participated in the larger Evergreen community with discussion, software patches, hosting test servers, participating in committees, attending the annual Evergreen International Conference, and volunteering at the first ever Evergreen booth in the exhibit hall at the American Library Association Annual Conference. MOBIUS staff also began working on the next year's contract with the Missouri State Library and the Executive Committee, which continues into FY2016.

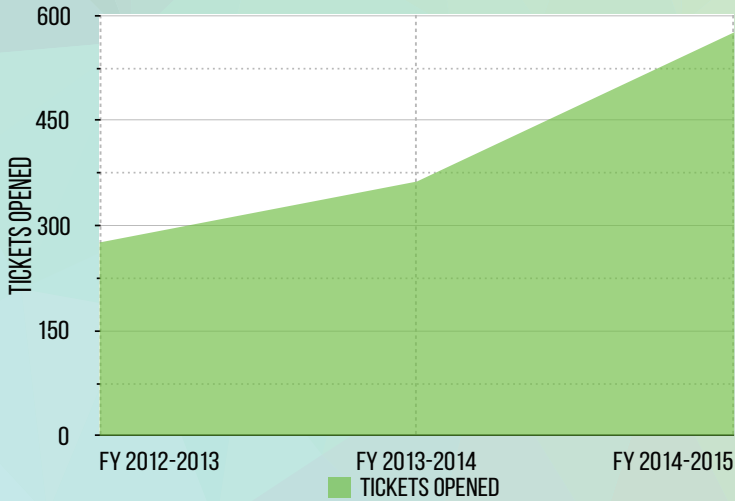
It is an exciting time to be a part of this open-source resource-sharing consortium, as it continues to grow and mature.

3 YEAR PATRONS AND ITEMS

	FY2012-2013	FY2013-2014	FY2014-2015
ITEMS	652,024	1,315,368	1,430,208
PATRONS	112,594	210,685	243,506

MISSOURI EVERGREEN HELP DESK STATISTICS

3 YEAR TICKET COUNT



TICKETS OPENED BY LIBRARY

ALBANY CARNEGIE PUBLIC LIBRARY	8
BOLLINGER COUNTY LIBRARY	3
CAMERON PUBLIC LIBRARY	13
CARROLLTON PUBLIC LIBRARY	3
CARTHAGE PUBLIC LIBRARY	47
CARUTHERSVILLE PUBLIC LIBRARY	7
DONIPHAN-RIPLEY COUNTY LIBRARY	8
GRUNDY COUNTY LIBRARY	6
HOWARD COUNTY LIBRARY	2
KANSAS STATE LIBRARY	2
LEBANON-LACLEDE COUNTY LIBRARY	20
LITTLE DIXIE REGIONAL LIBRARIES	20
MARION COUNTY LIBRARY	41
MARSHALL PUBLIC LIBRARY	15
OZARK REGIONAL LIBRARY	35
POPLAR BLUFF PUBLIC LIBRARY	40
SCENIC REGIONAL LIBRARY	198
SCHUYLER COUNTY LIBRARY	1
SIKESTON PUBLIC LIBRARY	16
STONE COUNTY LIBRARY	15
SULLIVAN PUBLIC LIBRARY	24
WASHINGTON PUBLIC LIBRARY	9
WEBB CITY PUBLIC LIBRARY	17
WEBSTER COUNTY LIBRARY	25

HELP DESK TICKETS OPENED BY LIBRARY

