

REVIEW OF MOBIUS 2001-2004 LONG RANGE PLAN ACCOMPLISHMENTS

July 23, 2004

A review of the *Long-Range Plan for MOBIUS* (July 2001-June 2004) shows that we are on target with the direction set for MOBIUS for the three-year period July 2001-2004. Following is a review of the Goals and Objectives completed, in progress, or on hold.

Goals Accomplished

TECHNICAL

GOAL: *MOBIUS will provide technology-based services, emphasizing the Common Library Platform as the primary mechanism for delivering those services.*

- Meet current implementation commitments to clusters
- Support standards-based technology in hardware and networking
- Remain current with Innovative Interfaces INN-Reach and Innopac software, including making use of new developments
- Provide remote access to the MOBIUS services and licensed products on the CLP

GOAL: *MOBIUS will provide specialized technology-based services such as access software and electronic database subscriptions.*

- Support licensing of electronic databases, while not replicating those services provided in a cost-effective manner by MOREnet or other providers
- Develop and support other electronic resources

SERVICES

GOAL: *MOBIUS will provide quality training, data conversion, and operational support to current and committed member libraries.*

- Provide both one-time and ongoing training for new and current MOBIUS member libraries
- Provide conversion of data from existing automated systems to the CLP for new members
- Provide operational support for new and current member libraries, with qualified staff, resources, and technology

GOAL: *MOBIUS will support Distance Learning as an extension of the CLP.*

- **Provide capacity through the CLP for Distance Learning services providers? Databases?**
- Facilitate delivery of materials requested for Distance Education courses

GOAL: *MOBIUS will provide courier service to support materials delivery*

- Provide courier service to and from every member site daily Monday through Friday

GOAL: *MOBIUS will license electronic subscriptions and databases (Services expression of a Technology objective)*

- Contract with database providers to develop cost-effective subscriptions for member libraries (*MERAC*)
- Support access control and license management software...in conjunction with electronic databases
- Support remote access to electronic databases for qualified users (*proxy server access*)

GOAL: *MOBIUS will communicate with and involve MOBIUS members and the larger Missouri library community in services development.*

- Conduct its services development planning in open and documented processes, and invite all MOBIUS members and advisory personnel to participate in planning
- Include details of its services development for public access in newsletters, Web documents, and public presentations

PLANNING AND ADMINISTRATIVE

GOAL: *MOBIUS will conduct planning as an ongoing effort, not just one-time plan development.*

- Support annual planning as an integral part of its operations, and MOBIUS plans will be public documents
- May solicit input from non-member libraries and other agencies as part of its planning processes

GOAL: *MOBIUS will secure a solid base of funding from the Missouri legislature.*

- Communicate goals, objectives, successes to Missouri's government to ensure government understands value of MOBIUS services
- Meet with and advise legislative and executive branch members and staff to promote a dedicated stream of funds for MOBIUS

GOAL: *MOBIUS will involve the Missouri library community in communicating MOBIUS plans and activities.*

- Distribute in electronic form and via paper its planning documents
- Continue to receive input regarding services development from *ex officio members on Board, from Missouri library community, and from other interested and qualified entities.*

GOAL: *MOBIUS will examine the needs and opportunities for compact storage.*

- Evaluate need, identify potential locations for and strategies for accessing materials in compact storage

GOAL: *MOBIUS will continue to use a Service Level Agreement (SLA) to define levels of technical and services support for MOBIUS services to its members.*

- Review SLA's from similar organizations and make recommendations regarding contents of MOBIUS SLA

GOAL: *MOBIUS will defer expansion of the MOBIUS membership until the organization has met its obligations to its current and committed members.*

- Consider expansion of membership when achieved completion of original eleven CLP clusters and services associated with the CLP (*Continue to add when requested and qualified*)
- Consider new categories of membership after achieved initial service goals (*Cooperating Partners Agreement*)

GOALS THAT ARE ONGOING

TECHNICAL

GOAL: *MOBIUS will provide technology-based services, emphasizing the Common Library Platform as the primary mechanism for delivering those services.*

- Remain current with Innovative Interfaces INN-Reach and Innopac software, including making use of new developments (*continue installing all upgrades as soon as practical after their release*)

PLANNING AND ADMINISTRATIVE

GOAL: *MOBIUS will secure a solid base of funding from the Missouri legislature.*

- Meet with and advise legislative and executive branch members and staff to promote a dedicated stream of funds for MOBIUS (*Seek increased funding leading to 50% support as originally planned?*)

GOAL: *MOBIUS will examine the needs and opportunities for compact storage.*

- Present compact storage alternatives to the MOBIUS community for discussion and input regarding the need for, location of, and access to compact storage.

GOALS NOT YET ACCOMPLISHED

TECHNICAL

GOAL: *MOBIUS will provide specialized technology-based services such as access software and electronic database subscriptions.*

- Develop and support other electronic resources **including a mediated Scholar's Portal to the Internet.** (an index and access mechanism including electronic materials, subscriptions, catalogs, and research services that are academically rigorous, have been evaluated by scholars, bibliographers, and reference research experts, and include services contracted for by MOBIUS and its members, by other consortia, or by state agencies)

SERVICES

GOAL: *MOBIUS will support Distance Learning as an extension of the CLP.*

- Provide capacity through the CLP for Distance Learning services providers, **and will investigate creating specialized services for DL courses offered through Missouri's Learners' Network**

PLANNING AND ADMINISTRATIVE

GOAL: *MOBIUS will conduct planning as an ongoing effort, not just one-time plan development.*

- Support annual planning as an integral part of its operations, and MOBIUS plans will be public documents **(involving member library representatives and the EC in annual planning processes, with the results widely disseminated)**

GOAL: *MOBIUS will conduct member needs assessments on a recurring basis.*

- As part of annual planning, solicit input regularly from members regarding their information technology and delivery needs. Methods include statistical and narrative processes that provide direct input to annual planning. **(Good place to add in the direction Mark's group is taking with regular site visits)**
- Experiment with and ultimately implement Web-based survey techniques for needs assessment. The survey will become part of a database of member information.