

Submitted by: Shirley Baker, Chair

This report covers tasks and activities undertaken during the period October, 2009 through December 2009.

Charge: The MOBIUS Crossroads Task Force, Sub-Task Force on Emerging Technologies is an advisory sub-unit responsible for analyzing emerging technology options for MOBIUS and reporting findings that can influence the ongoing success of MOBIUS and its vision for the future. This includes a review of the technologies currently available, both from vendors and open source, and surveying the landscape for horizon issues. Initially the group will focus on the next generation options for the MOBIUS union catalog and patron-initiated borrowing system.

Actions Taken:

1. Monitoring the development of the software sponsored by the Ohio State Library as a replacement for the INN-Reach union catalog.
2. Field trip to Portland, Oregon, to investigate Orbis Cascade Alliance's application of OCLC's **WorldCat Navigator** as a replacement for the INN-Reach union catalog that also supports participation by non-III systems in patron-initiated borrowing.
3. Field trip to Lansing, Michigan, to investigate:
 - a. The application of the use of Innovative Interfaces' **Direct Consortial Borrowing** (DCB) software to allow participation by non-III systems in patron-initiated borrowing;
 - b. The use of the open source **Evergreen** software as a system for libraries not interested in more complex and more expensive systems.
4. Discussions with State Librarian Margaret Conroy about possible State Library interest in supporting some initiatives to bring public libraries into MOBIUS.

Findings:

The software being developed in Ohio appears to be making very little progress, but we will continue to monitor it. **WorldCat Navigator** is working adequately for the Orbis Cascade Alliance. Staff functions need more refinement, but the system has promise. Innovative Interfaces' **Direct Consortial Borrowing** (DCB) is working well in Michigan in linking disparate systems for patron-initiated borrowing. **Evergreen** open source software appears to be working well for a basic set of functions but does not replicate all the functionality of current integrated library systems; i.e., acquisitions and serials control are lacking.

Observations:

The work of the MOBIUS Crossroads Sub-Task Force on Organizational Structure – to address the issues of governance and not-for-profit status – is the most urgent task in the next six months and should have the full attention of MOBIUS Council. That work must take priority. Follow-up on the Emerging

Technologies recommendations can move forward in the background as time allows. Having a three-year contract with Innovative Interfaces gives us time to move carefully and deliberatively.

Recommendations:

1. The Emerging Technologies Sub Task Force continue to monitor the Ohio software development and the implementation of OCLC's **WorldCat Navigator** over the next two or three years.
2. Request MCO staff to assemble detailed information about the III **Direct Consortial Borrowing** (DCB) product and share it with MOBIUS Council, with the possibility of moving forward with that software, should the State Librarian and some public libraries with non-III systems be interested.
3. The Emerging Technologies Sub Task Force and MCO staff monitor the development of and interest in the **Evergreen** open source software for working with the Missouri State Library on libraries without existing automated systems.