

**MOBIUS Emerging Technologies Orbis Cascade Alliance Visit
September 30–October 2, 2009**

Travelers:

Shirley Baker, Washington U
Donna Bacon, MOBIUS
Erlene Dudley, William Woods
Pat Logsdon, Washington U
Ann Riley, University of Missouri –Columbia
Steve Wynn, Truman
Anna Zaidman, St. Louis U

MOBIUS Goals for the visit:

- Learn about a next-generation option for MOBIUS services
- Investigate a solution to our situation of being locked into one vendor for all of MOBIUS systems
- Find ways to maintain and improve service

Questions to be addressed during the trip:

- What is Orbis Cascade's next step?
- What transition issues did they encounter? Was the transition "smooth and swift"?
- How does OCLC establish pricing for Navigator and WorldCat Local?
- How does Navigator work with III Encore?
- How does Navigator mesh with/replace federated searching?
- What about cataloging problems we hear about? Uploading records? Issues with locally added MESH headings? Local resource links? E-book collections?
- What about circulation issues? Check-in, check-out? Migration of circ status? How do patrons react? How does staff work change? Does "pick up anywhere" work?
- Do patrons like Navigator? Do they notice positive changes? Negative ones?
- Are any members using CatExpress to obtain their OCLC records?

Findings:

We spent a productive day at Portland State University, meeting with Orbis Cascade Alliance staff, the staff of other OCA libraries, and the Portland State staff who process consortium materials. OCA staff talked about why they moved from INNReach as their union catalog to WorldCat Navigator: ILL had increased their charges by several hundred percent. OCA had six months to make the change. OCLC fast-tracked the development of Navigator to meet OCA needs.

Observations by MOBIUS visitors:

- OCLC was very responsive to OCA needs and moved quickly to make changes.
- OCA put great emphasis on communicating the upcoming change to their end user community and the changeover – from the users’ point of view – was smooth.
- Navigator does communicate with non-ILL systems.
- Staff processes turned out to be more difficult than expected. Navigator software increased staff workload and OCLC needs to do more to solve internal workflow issues. OCA should have spent more attention to communicating with staff.
- Our having a reasonable three-year contract with ILL gives us advantage that OCA did not have with their only-six-month ILL contract.
- Taking our time and watching how Navigator develops is our best approach, since we don’t need a new union catalog immediately.

Other Observations:

Using WorldCat Local requires libraries to keep their holdings up-to-date with OCLC. All libraries did a reclamation project. Some libraries did not use OCLC, so had to start.

OCA created a lot of “workarounds” to make Navigator do what they needed.

One unexpected benefit of the trip was that we discovered that OCA is in the process of applying for not-for-profit tax status (501(c)(3)). OCA has a long relationship with the University of Oregon that is very similar to the relationship between MOBIUS and the University of Missouri. We were able to obtain a draft copy of the Bylaws being developed by OCA for their new organization. We were also able to discuss some of the functions they decided to leave with the University of Oregon, such as OCA employees remaining University of Oregon employees. In addition, we discovered that they had a similar situation that occurred in Missouri when the state database contract went to Gale instead of EBSCO. In fact, the similarities were uncanny.

November 12, 2009