



Special Board Meeting Minutes

MOBIUS

5/8/2025 10:30 AMCDT

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<https://us02web.zoom.us/j/83268808696?pwd=CINpJvvEFJCeTovX5RFuBOBQn1fgGw.1>

Attendance

Present:

Members: Donna Bacon, Sarah Brown, Janet Caruthers, Eileen Condon, Eric Deatherage, Maegan Gattorna, Bella Gerlich, Emily Jaycox, Kim Kietzman, Jill Mahoney, Donna Monnig, David Morris, Samantha Perkins, Sarah Smith

Guests: Gar Syndor

Absent:

Members: Jennifer Nutefall

I. Call to order and introductions

The meeting was called to order at 10:33am.

II. Adoption of the agenda

III. Strategic Plan Approval

Eileen Condon motioned to approve the Strategic Plan as revised, and Kim Kietzman seconded. The motion passed by vote of the Board.

 [Strategic Plan Final Draft-marked up.docx](#)

IV. EBSCO/OpenRS Update and Strategy Discussion

Steve, Vivian, and Donna Bacon met with Gar, Harry, and others from EBSCO. The MCO team expressed concerns about progress not being made by EBSCO. MCO indicated that we don't want to wait a long time for features to come out in a big release; we need them released when available. The MCO team made it clear that we will leave in two years if problems aren't resolved.

EBSCO promised to roll out smaller releases more frequently, will bring in someone to help with project management, and will do a dashboard. Steve and Donna met with Harry and prioritized all features and bugs. Two or three requested features have been loaded into production. The MCO office is testing staff requesting. Going forward MCO will have biweekly meetings with Harry. Regular project manager meetings will be scheduled. We want someone in EBSCO familiar with how MOBIUS operates to serve as our advocate.

There will be a session at the annual conference about how new releases are rolled out. Gar Syndor (EBSCO Senior VP, supervises Harry) is willing to meet with and listen to Board.

The Board noted that all of this feels like too little, too late. There needs to be an opportunity for members to share concerns directly with EBSCO. There's a session listed as a forum that could be a good place for this. Members can also visit the EBSCO booth to talk with reps. If some of the key features are fixed before the conference, that will help. Courier slips is fixed. The ability to place holds on checked out items is coming this week.

Should we share information about our losses of income and collection size with EBSCO? Our contract does not seem to offer us any remedies.

About a year ago we asked for a rough ballpark of when we could expect parity with the InnReach system. The response from EBSCO was not helpful--it focused on the new things FOLIO will be able to do, but not on the lost functionality. There are things we were able to do for decades that we can't do in FOLIO/OpenRS. David is copying EBSCO senior management every time something breaks. We are concerned about the potential loss of WashU. There are still problems with SSO. There is a concern we'll see momentum from EBSCO and then it will fade out. There was a suggestion to meet regularly with EBSCO, once every week or every two weeks, or ask for weekly updates. Donna and Steve are meeting frequently with EBSCO--maybe the Board could join that meeting once a month. We need to share information with members about progress, and let them know we're taking the issues seriously and considering exiting EBSCO.

What do we want to see on the dashboard? Do we set deadlines for EBSCO to accomplish priorities? Getting WashU and Christian County up on OpenRS are priorities.

ACTIONS for what we discuss with Gar:

- Ask for once per week progress updates from EBSCO
- Steve and Donna meet with them once per 2 weeks
- Board needs to meet with EBSCO leadership once per month (incorporate into Steve and Donna meetings)
- Gar - hypercare needed for WashU: their problems need immediate solving
- Give EBSCO deadlines
- Reputation and monetary loss....
- Loss of trust ...

 [Regional Meetings.docx](#)

 [EBSCO Contract 2022.pdf](#)

 [Implementation Income Losses.docx](#)

 [MOBIUS s6144727 ReShare Requirements Addendum-1.pdf](#)

 [ReShare Agreement Fully Signed.pdf](#)

V. Gar Sydnor, Executive Vice President, Research Databases and Library Services at EBSCO (11:15am)

Feedback from Board: The migration has been devastating for public libraries. Altoona has remained because they believe in MOBIUS, but it is difficult to justify continuing membership to their board, especially given declining borrowing/lending usage. Staff and patrons are stressed out. People are asking them to leave MOBIUS all the time. There has been irreversible damage to reputation. Some departing members may never come back. This is a critical situation that we might not survive. The problems have been preventable. Loss of \$100K+ in income and millions of resources. We need to see real progress. There has been damage to MOBIUS' culture. Members are colleagues, and the Board and MCO have been interacting with them positively since inception. Now there is a negativity and lack of trust we haven't seen before. We are losing member after member. MOBIUS is a small organization and does not have extensive resources to cover losses. There are concerns about loss of access to WashU collections, and difficulties with SSO implementation. SLCL borrowing and lending decreased by about half since the move to OpenRS. For Moberly, SGCL supplied about half of their borrowed items. Moberly's Finance VP is asking what's going on with MOBIUS. What are our assessments going to be if members keep leaving? Members can't justify remaining in MOBIUS if borrowing and lending continues to decline and ILL goes up. We need to see progress. PUA and visiting patron are very important. There has been a heavy load on MOBIUS staff, who are solving things that EBSCO has said can't be fixed.

Response from Gar: This is a sobering assessment, accurately reflected by Donna and her staff last week. He appreciated the candor in comments and apologized that the problems have affected us, staff, brand, and services. He understands the gravity of the situation and how frustrated we are. He's not going to offer a lot of excuses, and wants to get it right going forward. He thanked Donna and her team for communication and noted that their communication is not the cause of what's going on. Going forward, he wants to understand pain points, brand damage, etc. He will talk with Donna about how to get this information. MCO has prioritized the issues for EBSCO.

He noted that he wouldn't expect any customer to stay with EBSCO for as long as we have with these problems. EBSCO misjudged the time it would take to work with the libraries on disparate systems. They want to focus on getting consortial borrowing working better for libraries currently using it and on getting the remaining libraries working. EBSCO is wildly overextended on this, but that's not our concern. They are working more effectively with KI. GALILEO is in the midst of going live. EBSCO is allocating resources to this. There is only one InnReach expert, and they are working to free up their time to work on this.

Libraries that haven't started using OpenRS are waiting on features. Setting up a test environment for disparate systems has been difficult. If there's any help we can offer, this would help EBSCO move faster. Several features are ready or nearly ready:

- Supplier side cancellation support, released.
- Preventing same system borrowing, released.
- Re-request, enabled and ready.
- Allow requests on held and checked out items, ready.
- Renewal date synch, ready?
- Prevent renewals for items with holds, in staging for testing.
- Staff requesting, ready to be enabled. (But we later noted that this will be in DCB Admin and the permissions haven't been worked out, so it is functionally still unavailable.)

Locate versions (local and consortial) will be synched this summer. In the new release, which will be loaded early for MOBIUS in June or July, 26/27 issues have been fixed.

Gar stated that there was "never any agreement to recreate every feature of InnReach."

We are not a side project. There are a number of large consortia in US watching, and these problems have damaged EBSCO's credibility. EBSCO's interests are aligned with MOBIUS' in terms of getting things working. He asked for help for prioritizing communication. They have talked to Knowledge Integration and realigned resources along time zones.

A Board member asked if there a threshold for EBSCO where they will give up on this. Gar indicated that have incentive to continue with the project; they believe in FOLIO's future as a marketable, productive product. Gar gave a personal and company assurance that they will fulfill the contract.

Gar noted that WashU is waiting for features, and after that implementation should be easy. There is a good relationship between the sales team and WashU, and EBSCO will use that.

Some of EBSCO's resources are being directed to an implementation with GALILEO.

SCLC noted that they are a Polaris library and happy to help with testing. They want MOBIUS to be able to recruit departed members back.

EBSCO is working on a better point of contact solution.

Clustering data issues are fixed.

The Board noted a need to rebuild trust and ensure that a sense of urgency remains. Gar said they are looking for systematic problems and root causes, and will create processes that work well without extensive oversight. He will probably set up a very frequent 1:1 for MOBIUS with a single source of truth person from EBSCO.

A concern was noted that we're doing testing for EBSCO's financial benefit. Per Gar, testing with users is most accurate and effective.

We want EBSCO to have a presence at the MOBIUS conference. Gar is working out who to send. He'd like us to compile questions from the membership in advance.

VI. Follow Up Discussion

Next steps: Kim will communicate to the members that we are having high-level discussions with EBSCO and sharing member concerns with them, and that these direct conversations will continue. She will note that there has been progress since the MCO conversations with EBSCO at the EUG meeting. She will share details about recent fixes, what's ready, almost ready, etc.

 [Action Items Special Meeting 8May25.docx](#)

VII. Adjourn Meeting

The meeting was adjourned at 12:35.