



MOBIUS Crossroads Task Force

June 11, 2009

Osher Lifelong Learning Institute

Columbia, MO

Plus ten videoconferencing sites throughout Missouri

Prepared by

Erlene Dudley

Chair-Elect

MOBIUS Executive Committee

June 2009

MOBIUS Crossroads Task Force

AGENDA

June 11, 2009, 1:00 pm

- Introductions
- Brief History of MOBIUS
- Assessment of MOBIUS' Current Organizational and Financial Position
- Discussion of Vision Statement
- Steps to Success/Timeline/Communication
- Future Meetings

MOBIUS Crossroads Task Force CHARGE

The MOBIUS Crossroads Task Force will analyze, develop and recommend the optimal combination of strategic, structural and operational models to achieve the vision articulated.



A Brief History

June 1996	University of Missouri System comes online with Innovative Interfaces Inc. system
January 1997	St. Louis University comes online with UM to create MERLIN
July 1997	Washington University goes online with its own Innovative server; joins SLU and UM to create MIRACL
June 1998	Governor signs legislation approving \$10.2 million in funding for MOBIUS
September 1998	MOBIUS Council approves Innovative Interfaces Inc. software for "Common Library Platform" project

Jan. 4, 1999 MIRACL union catalog brought online under the name MOBIUS

1999-2001	Nine additional cluster servers brought online
2003	Two public libraries become cooperating partners

Source: MOBIUS Web Site <https://mco.mobius.umsystem.edu/development-of-the-mobius-union-catalog>



- The System
 - Statewide Union Catalog & Integrated Library System
- The Organization

Both are called MOBIUS!

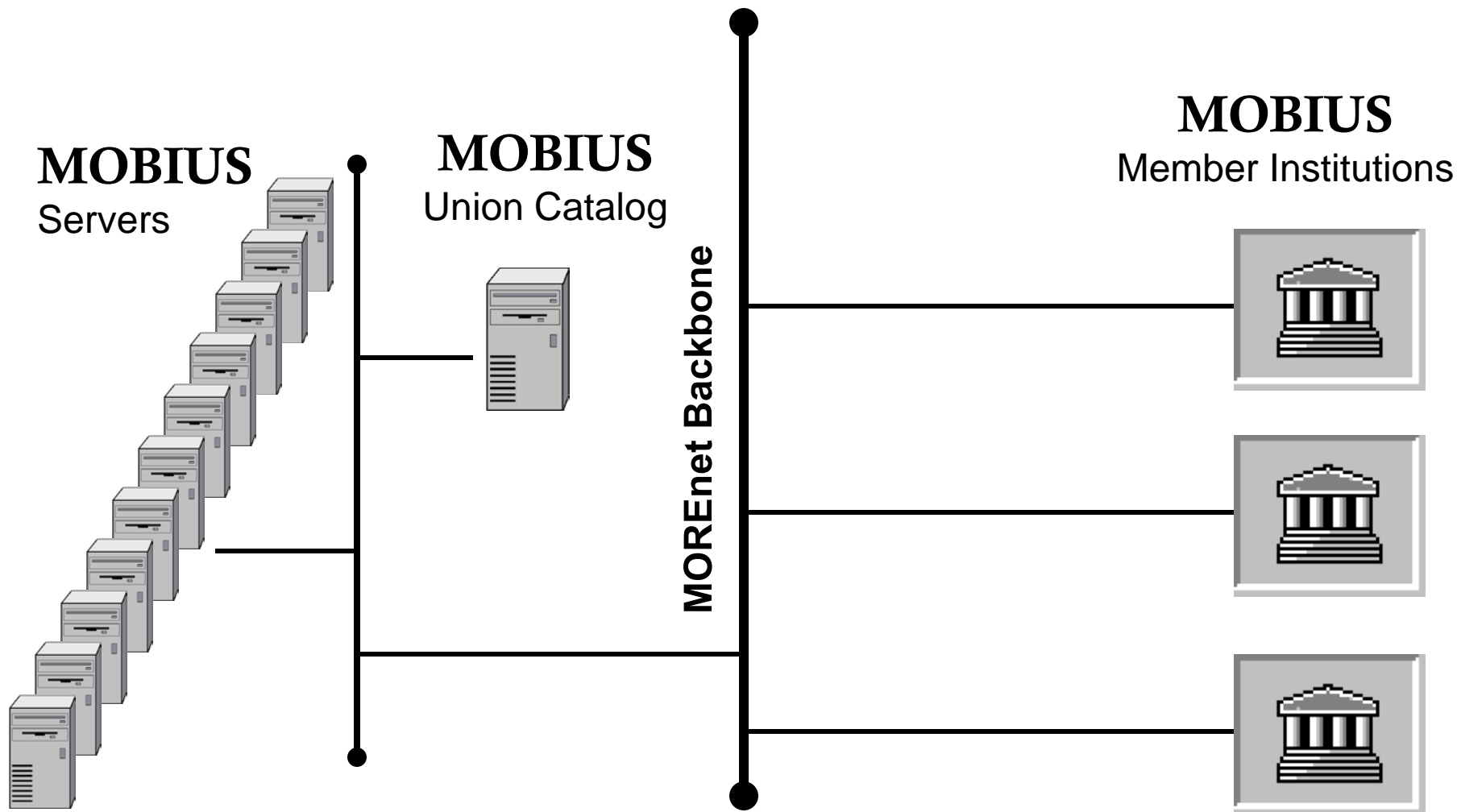
<https://mco.mobius.umsystem.edu/>

The System



MOBIUS

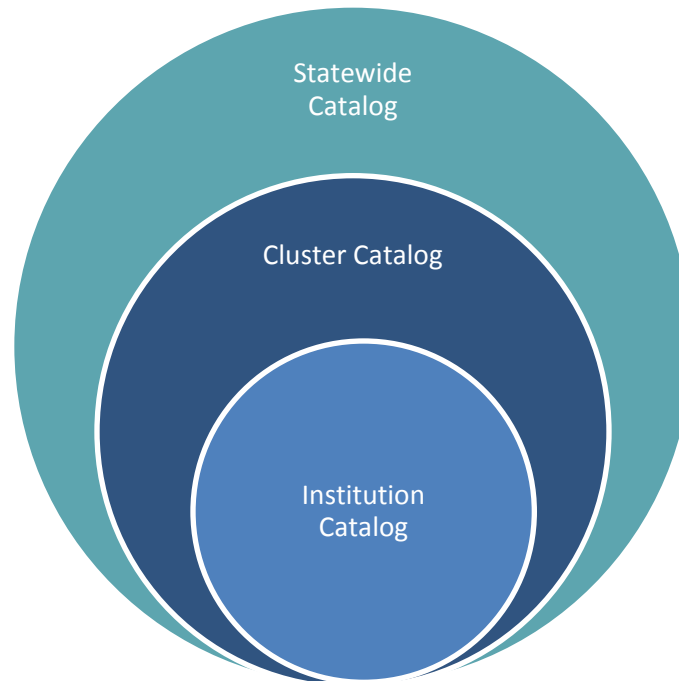
LINKING MISSOURI'S LIBRARIES





MOBIUS – The System

MOBIUS Integrated Library System – Resource Sharing





MOBIUS – The System

MOBIUS Union Catalog - Quick and Convenient Resource Sharing

- 20 million+ items
- Online Direct-Patron Borrowing
- Serves over 750,000 people from the higher education community and the state of Missouri
- Available from anyplace in the world with access to the Internet
- Courier service delivers library materials to member libraries once per day, five days a week.
- Pick-up at any participating library



The Organization



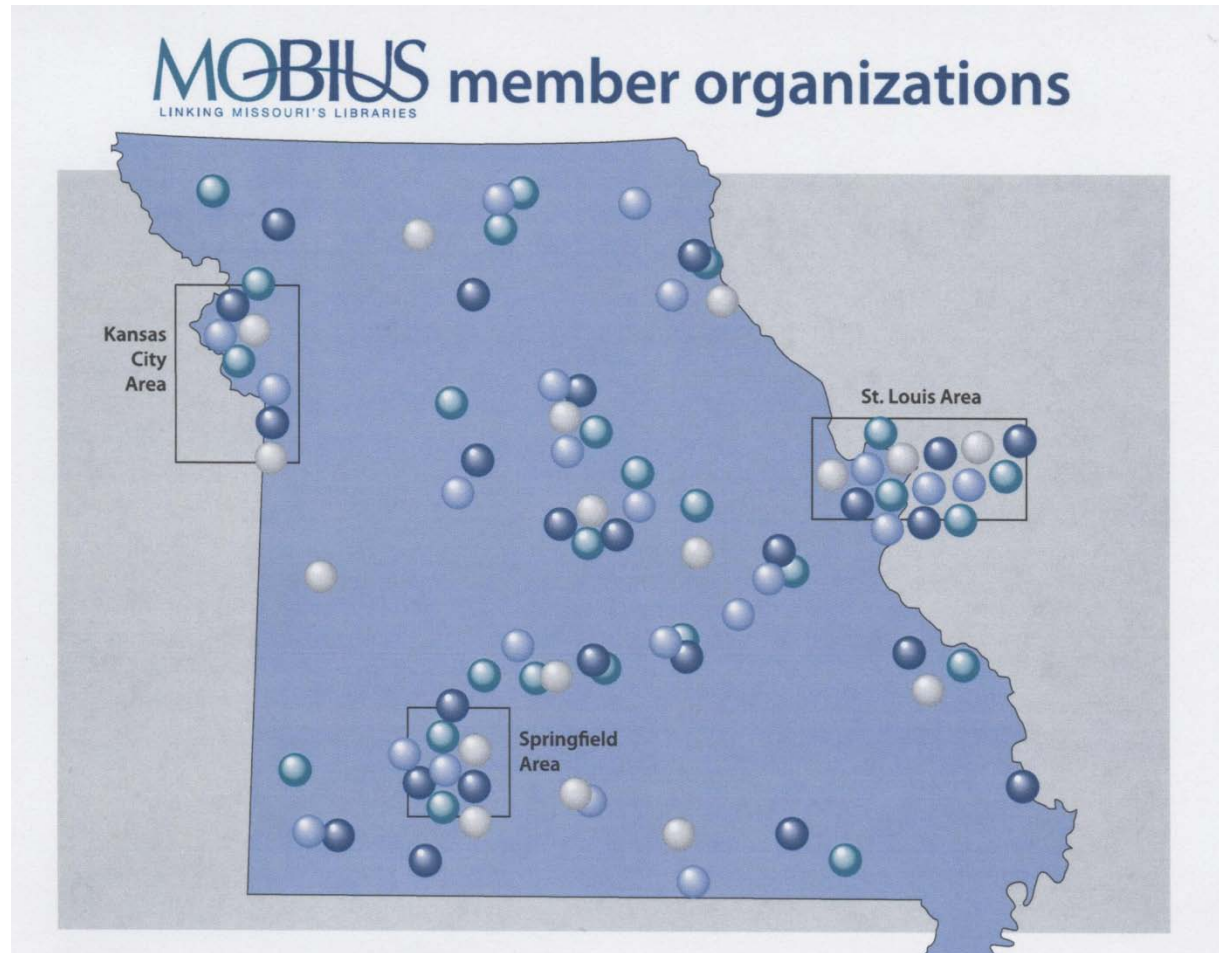


The Organization

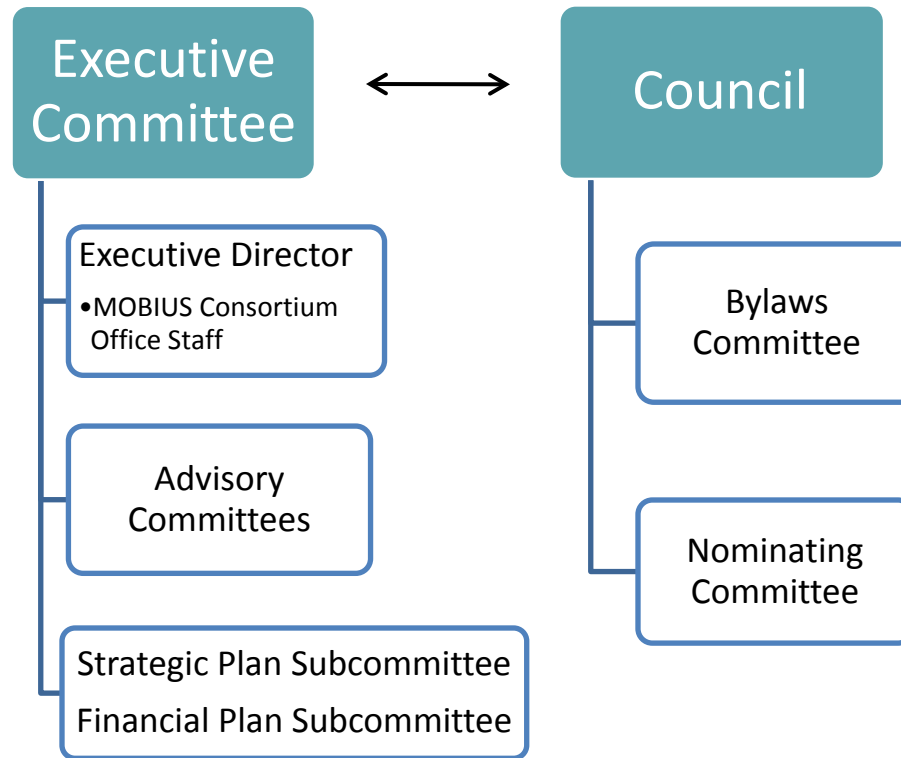
- 59 Academic Library Members
- Missouri State Library
- 2 Public Library Cooperating Partners

MOBIUS

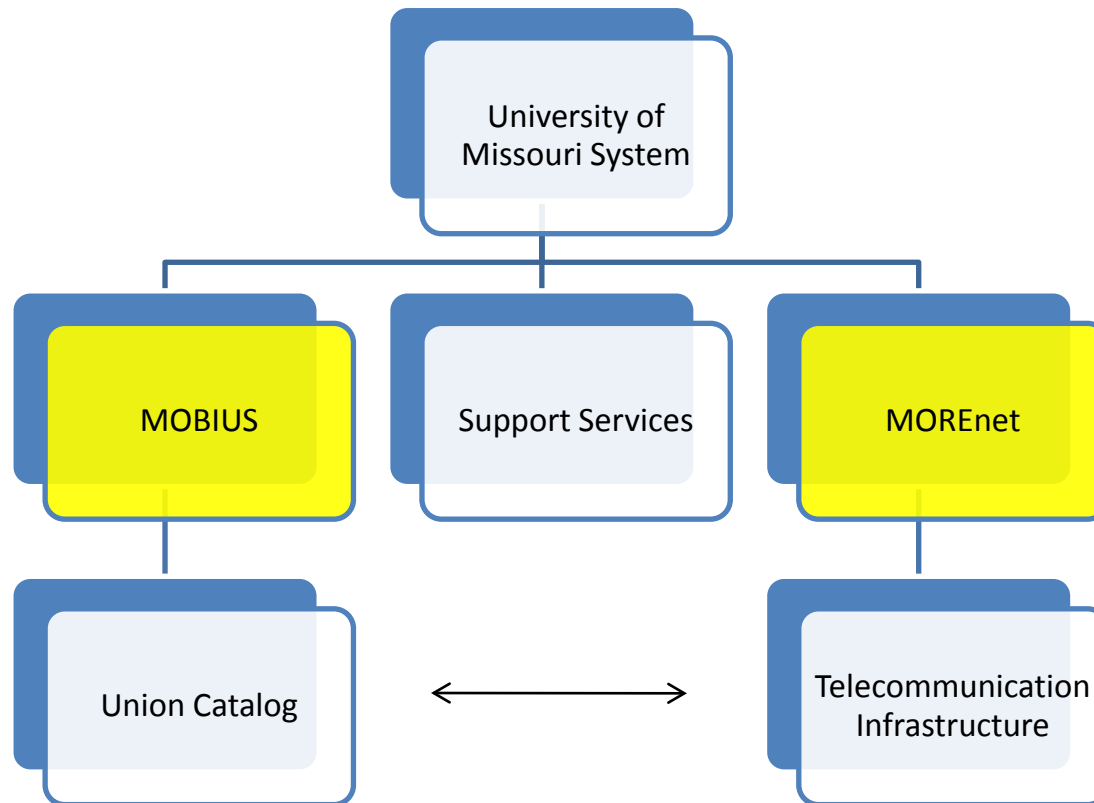
LINKING MISSOURI'S LIBRARIES



Organizational Structure



Organizational Relationships





Governance Documents

Memorandum of Understanding (1998)

Bylaws (1998)

Host Institution Agreement (1998)

Cooperating Partner Agreement (2003)



Partnerships (ca. 1998)

- Missouri Public Academic Library Administrators (MPALA) sought the support of the Missouri Council of Public Higher Education (COPHE) for the Common Library Platform project to encourage resource sharing among the academic libraries in Missouri
- To demonstrate support for MOBIUS, the Missouri Coordinating Board of Higher Education (CBHE) and COPHE requested the signatures of the CEOs of participating institutions on the Memorandum of Understanding
- MOBIUS received \$10.2M in funding from the Missouri State Legislature under the auspices of the Missouri Coordinating Board of Higher Education (CBHE)



Formation of MOBIUS

- Director of the University of Missouri, Office of Library Systems became the Executive Director of MOBIUS
- Host Site Agreement signed with the University of Missouri
- The MIRACL union catalog was brought online under the name MOBIUS
- The membership of MOBIUS was exclusively academic libraries plus the Missouri State Library



Memorandum of Understanding (MOU)

- Membership limitations – “MOBIUS is a consortium of accredited Missouri institutions of higher education and the Missouri State Library”
- Organizational limitations - Organizational structure defined in terms of the operation of the “Common Library Platform”
- Not easy to make changes



Bylaws

- Provide details based on the MOU
- Easier to make changes but cannot contradict the MOU



Host Institution Agreement

MOBIUS Executive Director reports to UM VP for Information Technology
Support Services Provided by UM (billed to MOBIUS):

Human Resources

- MCO staff are UM employees (terms of employment: retirement, leave, etc.)
- Establishing and defining positions, recruiting, hiring, compensating, evaluating MOBIUS employees

Procurement

- Specifying, bidding, purchasing, licensing, contracting for products and services according to the policies and procedures of UM

Accounting (Payable/Receivable)



Host Institution Agreement - continued

Support Services Provided by UM (billed to MOBIUS)

Information Technology

- Server operation/support
- MOREnet backbone access
- Desktop support
- Training
- Software Licenses
- Hardware discounts

Office space

Legal Services (contracts)



Legal Status of MOBIUS

- MOBIUS, by itself, has no standing as a legal entity
- MOBIUS cannot hire legal counsel nor does the University of Missouri Office of the General Counsel represent MOBIUS, except for negotiating contracts



Financial

- The state's contribution

Currently no state financial contribution

- The institution's contribution - 100%

Membership Fee

Usage Fee (Assessment)



**Reserve Funds
over \$500,000**

MOBIUS Crossroads Task Force

Vision Statement

A redefined and restructured MOBIUS should include:

- Expanded opportunities for membership from all types of libraries and cultural heritage institutions
- Improved opportunities for cost-effective sharing of resources statewide and regionally
- Increased purchasing power of an expanded membership
- Increased visibility and advocacy with funding sources

Continued -

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Vision Statement -continued

- Greater capacity for innovation
- Expanded opportunities for continuing library education and training
- Extended support for libraries and librarians as change agents within their communities and institutions
- Strengthened access to progressive and thought-provoking library leadership
- Broader networking and collaborative opportunities between organizations of dissimilar size and structure but with similar mission

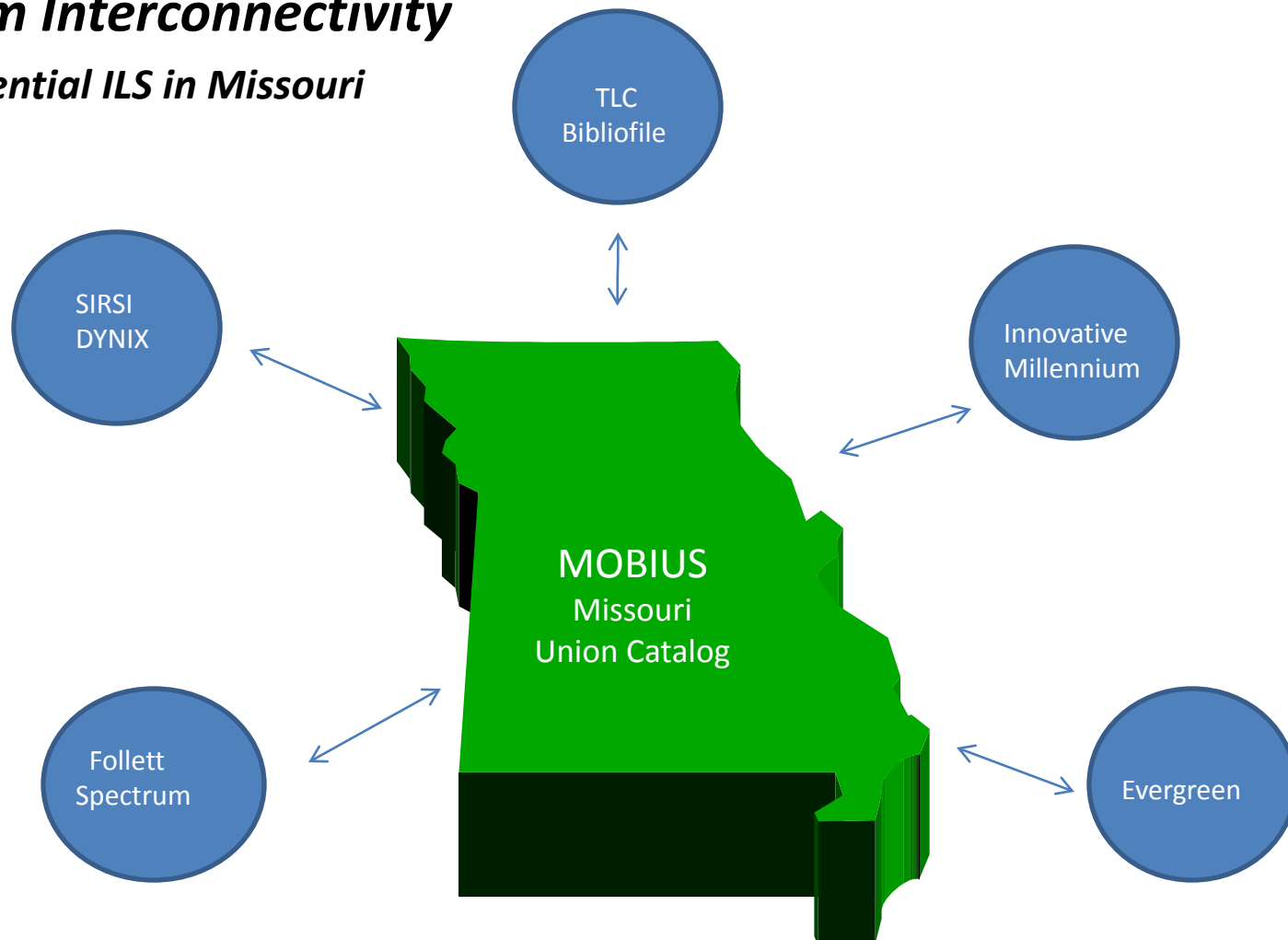
Source: Missouri Crossroads Task Force Charge

The Future



System Interconnectivity

Potential ILS in Missouri





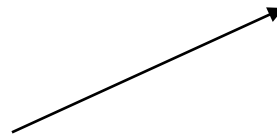
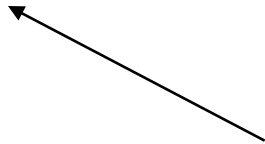
PRODUCTS

Federated Search
Discovery Tools
System Connectors
Electronic Resources
Etc.

SERVICES

MOBIUS Union Catalog
Courier
Training
Help Desk
Etc.

MEMBERS



Time Line

Report on the optimal combination of strategic, structural and operational models that will achieve the vision articulated for MOBIUS – due September 1, 2009

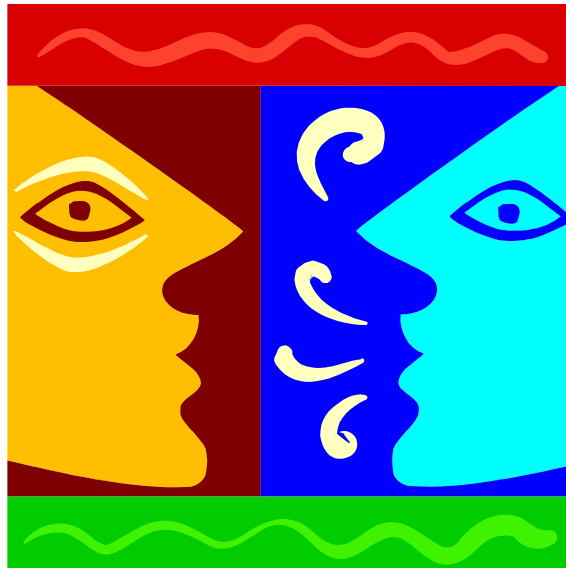
- Recommendation of a governance structure
- Analysis of the vision and strategic objectives of MOBIUS in terms of needs and means of potential participants
- Recommendation of a business/financial model
- Recommendation of organization-wide and executive leadership skills

Report on the recommended implementation plan, including timeline – due December 1, 2009

Steps to Success



Task Force Communication



Future Meetings



MOBIUS Web site
<https://mco.mobius.umsystem.edu>