

# **MOBIUS Emerging Technology Michigan Library Consortium (MLC) Visit November 30–December 2, 2009**

## **Travelers:**

Donna Bacon, MOBIUS  
Justin Hopkins, MOBIUS  
Erlene Dudley, William Woods  
Steve Wynn, Truman

## **MOBIUS Goals for the visit:**

- Learn about several next-generation options for MOBIUS services
- Find ways to maintain and improve service
- Find ways for Missouri libraries to participate in MOBIUS without using an Innovative local catalog
- Investigate the status of Innovative's Direct Consortial Borrowing (DCB) product

## **Questions to be addressed during the trip:**

- What is the status of Innovative's Direct Consortial Borrowing (DCB) product?
- What implementation issues did MLC discover with DCB? Operations issues?
- Are there any specific systems that MLC had trouble connecting to INN-Reach with DCB?
- How is MLC using Evergreen?
- What implementation/migration issues did MLC discover with Evergreen? Operations issues?
- How did MLC cover the costs of implementation for both DCB and Evergreen?
- How is development being coordinated for Evergreen?
- How does Evergreen compare with Millennium as a local catalog? Same functionality?
- What kind of training did MLC provide for DCB and Evergreen?
- What are MLC's staffing levels?

## **Findings:**

The visit to MLC was very productive for the MOBIUS participants. The first topic of the morning was a discussion of MLC's relationship with Innovative, specifically MLC's marketing of Innovative's new cataloging service, called Sky

River. Following this, the Evergreen staff described the use of Evergreen by MLC members (9 public libraries, 1 school library and 2 academic libraries). Shortly before lunch, Justin left to meet with the Evergreen staff separately to discuss operations in more detail. Donna, Erlene, and Steve met with the MLC support staff for DCB and saw a demonstration of MeLCat, discussed how DCB integrates with MeLCat, and discussed issues with record loads.

#### **Observations by MOBIUS visitors:**

- Evergreen does not yet have serials or acquisitions modules and most academic libraries are waiting for those functions to be developed by CONIFER.
- Evergreen is being used primarily by small libraries at this point.
- Evergreen is currently subsidized by MLC using LSTA funding but expects to be self-supporting within five years.
- The cost share for Evergreen was based on the number of patron records and the number of bibliographic records.
- MLC has appointed working groups to deal with governance issues; using peer pressure to get agreement.
- MLC outsourced operation of Evergreen servers to a large public library in Michigan rather than hosting them at the MLC headquarters. They do not recommend this configuration.
- MLC pays Equinox to migrate library data to Evergreen.
- Equinox/PINES plan to set up a foundation to handle open source development.
- MLC would not use Evergreen to replace Inn-Reach without significant changes.
- DCB appears to be working quite well to allow non-Innovative systems to participate in Michigan's INN-Reach union catalog
- DCB is essentially a stripped-down server client.
- Bibliographic records are batch-loaded daily using DCB.
- MLC uses an Innovation product called Scheduler that is required to make DCB work effectively.
- DCB load profiling is complicated but must be done carefully to be effective; load profiles control what shows up in the central catalog.
- Different systems on the local level have different abilities to exclude data; the Follette systems are the most difficult to work with.
- MLC has three DCB servers and processes 220,000 records per day per server.
- MLC has experienced some difficulty with the skill level at the local library level when working with both DCB and Evergreen; requires training and support from MC staff.

#### **Other Observations:**

MLC is already a tax-exempt, nonprofit organization and works very closely with the Michigan State Library.

The operation of MeLCat, the Michigan union catalog based on INN-Reach, is supported extensively by the Michigan State Library using LSTA funds and has been for a number of years.

MLC has very effectively provided options for Michigan libraries, such as Evergreen and DCB, to participate in a statewide union catalog and maximize statewide resource sharing.

MLC also operates a statewide delivery system.

MLC is in the process of merging with INCOLSA, an Indiana consortium.

December 10, 2009