# **Column Title: Library Networking and Consortia**

Column editor: George Machovec, Executive Director, Colorado Alliance of Research Libraries, 3801 E. Florida, Suite 515, Denver, CO 80210 (george@coalliance.org)

This column focuses on formal collaboration and networking among libraries through consortia. It offers in-depth examinations of issues facing modern library consortia including (but not limited to) e-resource licensing, ebooks, next generation integrated library systems, shared print programs, resource sharing, shared digital repositories, governance, planning, open educational resources, affordable learning, library consortia history, and other relevant topics to library consortia. Contributions are accepted for this column and must be submitted to George Machovec (george@coalliance.org). Contact the column editor for suggested topics, deadlines, and formatting.

# **MOBIUS: A Brief History**

**Donna Bacon**

**Executive Director, MOBIUS**

**donna@mobiusconsortium.org**

**ABSTRACT**

The MOBIUS library consortium has been the leading academic library consortium in Missouri for over two decades. Building on earlier collaborative work, seed funding from the state created the consortium in 1998 and MOBIUS became a reality. MOBIUS not only runs a shared integrated library system for most of the academic libraries in Missouri but also implemented a union catalog tying libraries together for resource sharing. Over time MOBIUS has expanded membership out-of-state into Oklahoma, Iowa, Kansas and Texas and as of 2022 MOBIUS has 80 library members with 232 branches. MOBIUS has also been active in licensing of e-resources for libraries, supporting member libraries in their use of open educational resources (OER), training and education, and running open-source software. The MOBIUS Open Source Services (MOSS) program is a service for members hosting software such as ArchivesSpace, Omeka-S, SubjectsPlus, and Evergreen (an open-source ILS). MOBIUS actively works with other consortia around the United States.

**KEYWORDS**: Missouri, consortia, consortium, academic libraries, higher education, technology, resource sharing, interlibrary loan, INN-Reach, union catalogs, open educational resources (OER), open-source software

 In the late 1990s, the Missouri Public Academic Library Administrators (MPALA) formed a task force to investigate the possibility of an academic library consortium that would enable libraries to maximize the use of the academic library collections in Missouri. The project, then known as The Common Library Platform (CLP), was additionally supported by the Council on Public Higher Education, the Coordinating Board for Higher Education, and the Missouri State Library. This project would provide shared integrated library systems for all of its members and a union catalog that provided online direct patron borrowing. The consortium would provide higher quality service, support and training delivered at a lower cost than institutions could achieve individually, provide effective library services for distance learners delivered at a sustainable cost, and be economically sustainable by increasing student and faculty access to and use of library-provided information to support and improve instruction and research. The consortium would also assist with consortial licensing of electronic information resources by using the economic leverage of the group to provide increased access at affordable cost to these expensive but essential products.

 During this time, Saint Louis University, the University of Missouri, and Washington University at St. Louis were researching new integrated library systems. The three institutions eventually came together to form the MIRACL catalog in 1997 using the Innovative Interfaces system, which eventually became the basis of the MOBIUS Union Catalog.

 In 1997 MPALA hired Joe Ford as a consultant to explore and recommend the possible structure of this new consortium. He wrote a report in support of forming MOBIUS with Missouri State Appropriations which has come to be known as “The Gold Book”. MPALA was successful in receiving funding for the project when, in June 1998, the Governor signed legislation authorizing over $10,000,000 for the creation of MOBIUS. In May 1998, a MOBIUS Memorandum of Understanding went out to college/university CEOs for signatures, with 46 libraries responding in the affirmative. An RFI was issued and eventually, in Sept 1998, the MOBIUS Council approved Innovative Interfaces as the software for the Common Library Platform. MOBIUS was created with 50 charter member academic libraries. Ten regional clusters would be formed which enabled libraries to share one instance of the Innovative ILS on a server. Innovative’s resource sharing system, Inn-Reach, would serve as the union catalog and resource sharing tool. The formation of an office with staff needed to be developed and requests went out to institutions for a host institution. In December 1998, a host site agreement was signed with the University of Missouri, and an office was formed. The MOBIUS Consortium came to life on July 1, 1998 and on January 4, 1999 the MIRACL Union Catalog was brought online under the name MOBIUS.

 MOBIUS staff were hired and became part of the University of Missouri Library Systems Office. The next several years were spent in implementation of the 50 charter member libraries. During these years, MOBIUS developed a “cafeteria” plan, contracting and managing discounts on electronic resources for its member libraries and received LSTA funding to develop and manage an annual conference for its member libraries, which is still held today. The MOBIUS Office staff has continued to offer migration and implementation services, help desk support, IT support, and training for our member libraries. The faculty and staff of our member institutions started taking for granted the ability to borrow nearly any book from any academic library in the state without delay or complication. There are no forms, no cost, and no weeks of waiting. The name MOBIUS became a verb. We heard students wanting to “MOBIUS” an item. In 2003 the MOBIUS Union Catalog held a little over 16 million items and has expanded toalmost 30 million items available in 2022.

 In 2001, MOBIUS entered into a contract with Lanter Delivery Systems for courier to all of our member libraries. We switched couriers to 1st Choice on July 1, 2007. On July 1, 2015 we switched to STAT Courier and have continued to use them to the present day. We partnered with STAT Courier on other courier projects as we extended our reach outside of Missouri. MOBIUS partnered with STAT on a contract with the State Library of Iowa to manage courier service for the public libraries of Iowa in 2019. Before that, we started managing courier service for the Rivershare Libraries Consortium (Iowa) and the Iowa Library Alliance in 2016.

 More libraries joined after the implementation of the original members and we have continued to add new members. In 2003, Springfield-Greene County Library became the first public library to join MOBIUS and share their items through the MOBIUS Union Catalog. This library system would be the second “standalone system” (a library that managed their own Innovative system and did not reside on any cluster server), with Washington University at St. Louis being the first standalone. About the same time, St. Louis University, which was originally part of the MERLIN (University of Missouri Cluster) system, migrated to their own Innovative server and became an additional “standalone” system.

 On June 30, 2005, the state of Missouri ended its partnership with MOBIUS by terminating all appropriations that helped fund the organization. This end meant that MOBIUS would be fully funded by the membership. This scenario was difficult, but the membership stepped up and agreed to make up the difference in funding to keep MOBIUS going. They all understood the great value of the consortium.

 In 2010, MOBIUS separated from the University of Missouri and became a nonprofit organization with 501(C)(3) status. This separation enabled us to reinvent our organization, creating a new strategic plan that increased membership, expanded services and found new ways to meet our mission of providing quality information resources to the citizens of Missouri and beyond.

 Over the next several years, several more Missouri public libraries joined MOBIUS as standalone libraries in Missouri: Missouri River Regional Library, Christian County Library, St. Louis County Library and St. Charles City-County Library. We expanded membership out-of-state, into Oklahoma, with Tulsa City-County Library being our first out-of-state library, in 2013. In 2016, Altoona Public Library and West Des Moines Public Library joined, with Altoona being our first Polaris library. The Davenport Public Library and Bettendorf Public Library in Iowa also joined over the last several years. MOBIUS has three library members in Kansas: Benedictine College, Saint Paul School of Theology, and Kansas City Kansas Community College. The Central Arkansas Library in Little Rock joined in 2020. In 2016, we added Palmer College of Chiropractic in Iowa and Southwestern Baptist Theological Seminary in Fort Worth, Texas. Both reside on their own Sierra server and are managed by MOBIUS. In 2021, Palmer left MOBIUS to migrate to Sirsi Dynix. In 2015, MOBIUS added a new cluster created from The St. Louis Research Library Consortium who asked to join MOBIUS and have their Sierra server become a cluster. We renamed them Explore. Four special libraries reside on Explore: St. Louis Art Museum, Missouri Botanical Garden, Missouri Historical Society Library, and Goldfarb School of Nursing at Barnes Jewish College. By 2022, MOBIUS had 80 library members with 232 branches.

 MOBIUS, has, unfortunately, had some member libraries leave our organization. In 2019, the University of Central Missouri chose to leave and migrate to Alma. In 2020, Missouri State University left to migrate to FOLIO. Also in 2020, Baptist Bible College left MOBIUS due to financial constraints. We have had a few libraries change to standalone libraries, negotiating their own contract with Innovative Interfaces and managing their own system but still continuing to resource share with the MOBIUS Union Catalog- the University of Missouri System in 2016 and Southeast Missouri State University in 2018.

 In 2017, MOBIUS merged four of our clusters in order to save money with our Innovative Interfaces contract when the University of Missouri became a standalone institution. Lance and Quest merged to become Avalon on October 18, 2017. Kansas City (formerly WILO) and Towers merged to become KC-Towers on August 23, 2017. The Galahad cluster was dissolved in 2018 after Southeast Missouri State University became a standalone. There were only three institutions on this cluster, SEMO, Three Rivers Community College, and Mineral Area College. Three Rivers and Mineral Area did not want to maintain a cluster with only two libraries so it was decided they would merge onto the Archway cluster.

 In 2013, MOBIUS entered an agreement with the Colorado Alliance of Research Libraries (Prospector), a consortium of public and academic libraries in Colorado, to connect our INN-Reach catalogs with Innovative’s peer-to-peer software enabling patron initiated borrowing between our two union catalogs. Our users gained access to large collections with a click of a button. We were also able to connect our courier systems to assist in moving materials back and forth. (Bacon, 2014)

 With the advent of our new relationship with Prospector, MOBIUS also expanded courier service outside of Missouri by connecting our libraries to the CLiC and Amigos Courier Systems, giving our libraries access to over 600 libraries in Colorado, Oklahoma, Texas and New Mexico, delivering traditional materials for a fraction of the cost of postal services.

 In 2012, MOBIUS bid on and won a contract with the Missouri State Library to host and manage Missouri Evergreen, a consortium of Missouri public libraries using Evergreen, an open-source ILS. This contract included two staff who eventually became permanent members of the MOBIUS staff as our Evergreen services expanded beyond this specific project. MOBIUS migrated 44 libraries into Missouri Evergreen from 2012-2019, before their consortium moved their contract to Equinox.

 We expanded our Evergreen hosting and management services with a contract with the Kansas State Library on July 1, 2015. Our second Evergreen contract was with NC Cardinal, a public library consortium for the state of North Carolina, which began on October 31, 2017. This contract was renewed several times and their consortium expanded. We have added several other libraries to our Evergreen service: Asbury Theological Seminary, CW MARS, NOBLE, North Texas Library Consortium, and Ozark Regional Library. This service continues to expand and we are adding more Evergreen consortia and individual libraries to our software as a service (SaaS), which is now called MOSS, MOBIUS Open Source Services.

 MOSS expanded to include open-source software to host and manage for our membership as well, such as ArchivesSpace, Omeka-S, and SubjectsPlus. We have an Associate Director of Open Source Initiatives who has helped to guide this service and expand our offerings. As our open-source services expanded, our staff responsibilities shifted and increased to more technical staff: a Senior Development Engineer, a Linux Systems Engineer and a Full Stack Developer. These staff not only have assisted with the MOSS projects but with all of the other programming and technical needs of the office and membership.

 Due to MOSS, MOBIUS went through the process of receiving SOC2, Type 2 compliance. SOC2, Type 2 compliance demonstrates that our organization has adequate controls in place governing information security in our environment. An independent audit is performed by a third-party CPA firm that follows five trust service criteria: security, availability, confidentiality, processing integrity, and privacy. A rigorous process is followed in the office to maintain this compliance so that we may provide our membership and customers the best possible service and security.

 The MOBIUS electronic resources discount program started out as a small “cafeteria” program focused on providing discounted pricing on database and journals products. It grew to include relationships with more than 50 vendors and offers discounts on databases, eBook packages, video collections, journals, discovery layers, SAAS platforms, and a shared chat reference solution. The program has also shifted to support collaborative collection development projects, shared ownership of electronic content, and open access. In 2022, we signed a memorandum of understanding with the Iowa Academic Library Alliance to provide electronic resources management services to 35 Iowa academic libraries based on an annual fee structure.

 Three collaborative collection development projects were very successful for our consortium. Our first consortial eBooks package was purchased from EBSCO, a subscription package which gave our users unlimited simultaneous use of eBooks, and for many of our libraries, the ability to add eBooks to their collections for the first time, mostly for pennies per title. More than 25 academic member libraries began to participate in a shared OverDrive collection that allowed them to pool funds to provide access to more than 20,000 audiobooks and eBooks. MOBIUS was among the first academic consortia to create an OverDrive shared collection and has been a model for other organizations. Through this partnership, MOBIUS has been featured in several presentations and articles. The consortium has also begun to explore shared ownership of perpetual access resources though a two-year, evidence-based acquisition pilot with Sage Publishing involving 14 member libraries working together to make purchasing decisions based on collective usage data.

 MOBIUS has also been active in providing support for initiatives around Open Educational Resources (OER). We joined the Open Education Network in 2017 and through that partnership we were able to offer our members affiliate membership in the OEN, professional development opportunities, training on open publishing concepts, and the opportunity to conduct OER workshops through the OEN for their own faculty. We also have maintained a MOBIUS Hub on the OER Commons platform, allowing our members to each have a dedicated space where they can discover, curate, and highlight OER content produced in and adopted at MOBIUS member institutions. Through our OER System Leader program we leveraged local expertise to provide training and professional development opportunities on topics personalized to MOBIUS members, allowing members to learn from and connect with peers working on OER in their region.

 In 2020, MOBIUS received our first Digitization grant from the Missouri State Library for the purchase of a digital access management and IR platform for 25 of our member libraries. We chose to purchase Vital from Innovative Interfaces. We have been fortunate to receive additional grants to assist with metadata input and scanning of resources. This project assisted libraries who could never have afforded to do this on their own.

 In February 2021, MOBIUS became a member of Project Reshare. The vision of Project Reshare is a user-centered, app-based community-owned resource sharing platform that will allow the connection of disparate ILS platforms. Participation in this project will allow MOBIUS to explore a potential viable alternative to INN-Reach as we consider the best path forward for our shared ILS and resource sharing platform.

 In September 2021, the University of Missouri announced they had made a decision to migrate from Sierra to FOLIO. They wanted to remain MOBIUS members but this brought new challenges as to how we would be able to connect a disparate system to INN-Reach. A special interest group began working on an API to connect FOLIO to INN-Reach, expected to be completed sometime in 2022. This was our first library member to migrate to a different ILS and want to remain as a member library.

 On November 15, 2021, MOBIUS issued our first ILS RFP since signing our original contract with Innovative Interfaces in 1998. The MOBIUS Board of Directors formed an ILS RFP Working Group to write the RFP, organize the process and recommend a final choice to the board. Bids for the ILS RFP were received by the deadline of February 8, 2022. Vendor presentations for the membership were held in April and May 2022. The working group made a decision at their July 2022 meeting to be presented to the Board of Directors meeting on August 12, 2022.

 Libraries are dealing with a rapid change of pace in the world of information and technology. We know the best way to serve the citizens of Missouri is to work together on common goals. The breadth of service MOBIUS offers has continually expanded since its inception: faculty, staff, students, and other patrons have easy access to almost 30 million items in the MOBIUS Union Catalog and another 32 million from the partnership with the Prospector. We have crossed state borders into Iowa, Oklahoma, Kansas, Texas and others to create partnerships that truly provide the best access to the best materials available to our citizens.

 Through our ever-evolving range of services, MOBIUS continues to support the original Common Library Platform and resource sharing model for Missouri libraries, saving our libraries millions of dollars annually and offering a one-of-a-kind service to the citizens of Missouri and the Midwest.

**References**

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