MOBIUS

ANNUAL REPORT

FY 2013–2014

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ANNUAL REPORT

Change
"The act or instance of making or becoming different"

Adapt
"Become adjusted to new conditions."

Compromise
"A settlement of differences by mutual concessions."

Change, adapt, compromise—

all words that come to mind when I think of the past year. Where do we see our organization going? How do 71 libraries of all different types and sizes march forward in unison? How do we increase resource sharing, create new partnerships, and continue to grow but still stay true to our original mission?

This was truly a year of transitioning, for the MOBIUS staff, and for our member libraries. As we grow, communication becomes harder. Compromise, tolerance, understanding, and a united front becomes essential. We have so many opportunities, so many ideas, and so many new ways we can support our libraries and increase services to our users that we sometimes forget each other and what our organization means to so many.

As I travel, meeting prospective new members and other consortia, I am continually impressed (as are others) by what we've accomplished. I hear others tell me they wish they had a "MOBIUS" in their state. They have all tried several times over the years and failed. We need to remind ourselves sometimes that the type of organization and resource sharing model we have is unique in many ways. That our members help drive this organization, help create our vision, and help us all to march forward in unison. We may have growing pains due to new partnerships, new members, new services, but together we find a way to make everything work.

We started our year by holding a Director's Retreat. It was a full day of discussing and planning

MOBIUS

NEW
Products Purchased from Innovative

- ▶ Eden-Webster--New Scope
- ▶ GALAHAD--Genre Index
- ▶ Lincoln-- 2 Circa Barcode readers
- ▶ Midwest Baptist--CJK Indexing
- ▶ William Jewel--Express Lane
- ▶ INN-Reach--Web Access Management, Encore, Enhanced Matchpoint

IUG CONFERENCE SCHOLARSHIP

Congratulations goes to the recipient of the second MOBIUS IUG Conference Scholarship:

Melanie Church
Content Services Librarian, at Rockhurst University

This was Melanie's first IUG. According to Melanie, *"For a new professional, such as myself, the importance of contact with a diverse range of experienced professionals cannot be overstated."*

TRAINING

MOBIUS continued to travel to our member libraries for a total of 12 onsite sessions. We also provided several online training sessions including Library Juice Academy, ALA Virtual Conference, and EBSCO eBook Training.

REVENUES

FY2011-2012--$5,274,527
FY2012-2013--$5,437,521
FY2013-2014--$6,346,502

EXPENSES

FY2011-2012--$4,966,345
FY2012-2013--$5,334,255
FY2013-2014--$6,335,925

"Last year our member libraries saved *$3,247,155* by subscribing to e-resources through MOBIUS. "

for the future and evaluating the present. It went so well, that we have decided to hold this type of retreat frequently. It set the tone for the rest of the year.

Most of the year was spent preparing the MOBIUS office to manage their own Human Resources. As of July 1, 2014, the MOBIUS staff were no longer University of Missouri employees. This involved a tremendous amount of work by the Board of Directors and the MOBIUS staff. We hired an HR Consultant who assisted us with all aspects of establishing our own HR policies, procedures, benefits, and payroll. We are now fully separated from the University and managing all aspects of our organization.

The MOBIUS Office welcomed a new employee on August 6, 2013.

Stephen Strohl joined us as our Implementation Coordinator after working at Innovative Interfaces for 13 years. Steve is an alumni of the University of Missouri and is happy to be back in the Columbia area. His wife, Jeannette Pierce, works as the Associate Director for Research & Information Services at Ellis Library, University of Missouri.

We welcomed new member libraries to MOBIUS. Evangel University went live on the SWAN Cluster on October 30, 2013. Tulsa City-County Library agreed to become our first out-of-state member library. We also made an agreement with the Colorado Alliance of Research Libraries (Prospector) to connect our InnReach systems together with the Peer-to-Peer software from Innovative. This would allow us to share materials with their 44 member

Board of Directors

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libraries. This is the first time two large consortia have agreed to share materials across state lines and we have been sharing our experience with other libraries, consortia, and at conferences.

For the first time since MOBIUS was formed, we welcomed the addition of a new cluster, Explore. Explore includes the St. Louis Art Museum, Missouri Botanical Garden, Missouri History Museum, and Barnes Jewish College Goldfarb School of Nursing. They will go live in the spring of 2015.

Reaching across state lines brought us some unexpected benefits. Our libraries now have courier access to more than 255 member libraries of the Trans-Amigos Express which includes Texas, Arkansas, New Mexico, and Oklahoma. The new partnership with Prospector allowed us to connect our courier system to almost 300 libraries in Colorado via the Colorado courier, CLiC. Not only did we increase access to more collections, but we saved our libraries money by expanding our courier service. Trans Amigos Express service began on June 10, 2014 and CLiC service began on August 5, 2014.

On July 1, 2013, MOBIUS began an ebook subscription for the consortium to about 138,000 titles from EBSCO. We spent most of the last year evaluating and selecting a vendor. Fifty-nine of our libraries are participating in the eMO project. There were 289,181 eMO sessions in the first year. Our e-resource offerings grew from 12 products to 69. Last year our member libraries saved $3,247,155 by subscribing to e-resources through MOBIUS.

Web Access Management was added to the MOBIUS Union Catalog so that we could use one proxy link for the eMO collection. It took most of the year to work through this implementation. Encore was installed on the MOBIUS Union Catalog which will eventually become our main point of access to the union catalog. We also began the process of installing and configuring Enhanced Matchpoint, an Innovative product that will remove duplicates, separate electronic records from print records, and complete other record cleanup on the catalog.

Four member libraries subscribed to Sky-River, a bibliographic cataloging utility, sold by Innovative Interfaces. William Jewell College, Moberly Area Community College, Kansas City Art Institute, and Covenant Theological Seminary all subscribed this year and will give a report to the membership in the spring of 2015 about their experience.

The MOBIUS Annual Conference underwent some changes this year. We created tracks this year which included Collections: Development, Management & Access, Leadership & Management, Marketing & Outreach, and Practical Applications of Sierra. Instead of an evening keynote, we invited keynotes for each track. We were very lucky to have some well-known speakers--Rick Anderson, Susan Ashby, Erin Dorney and Jill Emery. Innovative Interfaces hosted dine-arounds for Monday evening, shuttling guests to 4 area restaurants to eat dinner with the keynotes. The Missouri Training Institute offered a full day session on training day about Motivating Employees. Overall, the conference was another success and the changes were well received.

Becoming a fresh and innovative organization has stretched our thinking, created new perspectives and challenges, and forced compromise on all levels. We have the opportunity to expand our organization, and to develop more services, all the while remembering why our organization was formed and our mission. Change, adapt, compromise---this will keep our organization thriving.

"This is one of the best library conferences I've attended in a long time."

2014
Conference Sound Bites

"The post conference training is the part I will be able to apply immediately to my job."

"I always feel that presenters . . . want everyone to walk away with knowledge that will make a difference . . . in the library"

"Relevant topics and interesting information! Every session had ideas that can be taken back to the home library & applied!"

"Learned lots of new things to try and things to STOP doing."

MOBIUS by the Numbers

eMO

287,660

Top 5 Subjects
1. Social Sciences
2. Medicine
3. Language & Literature
4. Philosophy, Psychology, Religion
5. Education

User Sessions

members trained

316 total

Online

MOBIUS Conference: Training Day

EBSCO eBook Training

Library Juice Academy Courses

ALA Virtual Conference

Sierra Training

Face to Face

helpdesk

↗ **16%** from FY '13

90,009,476
total records loaded FY '14

73% of help desk tickets are closed in less than 24 hours
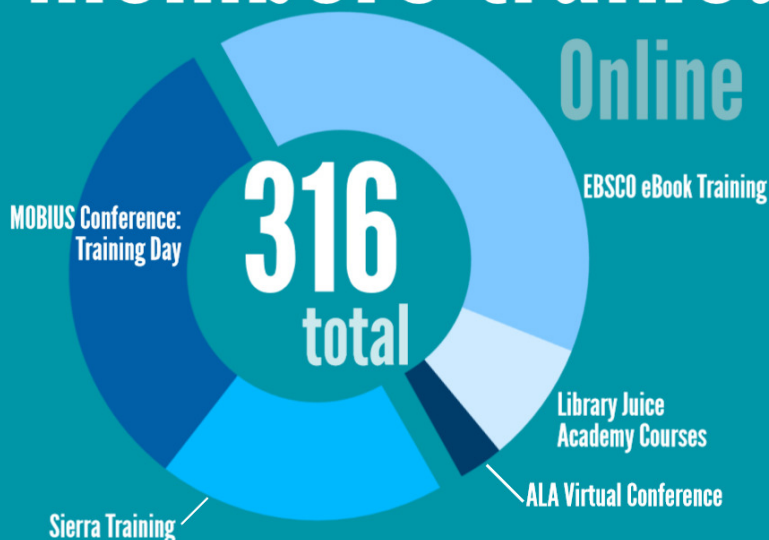
"MOBIUS can track down **obscure titles** *-they're the reason I was able to read Talbot Mundy in school."*

'My children used MOBIUS in college, and now they are a published author and **successful** *engineer.'*

circulation

132,099 INN-Reach

176,012 borrowed items

43,913 intra-cluster

ROI eResources

OVER **3.2** MILLION SAVED

▶ In FY2013-2014, the MOBIUS Help Desk opened 12,851 tickets and closed 12,823. Breakdowns by queue, month, and institution are seen below.

	TICKETS OPENED & CLOSED							
	E-RESOURCES	EMERGENCY	GENERAL	IMPLEMENTATION	QUOTES	RECORD LOADS	TRAINING	WEB SERVICES
OPENED	16	7	1817	18	7	10790	14	182
CLOSED	16	7	1754	23	6	10795	21	201

	TICKET BREAKDOWN BY MONTH											
	JULY	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE
OPENED	973	1067	1051	1129	1050	1100	1186	1041	1092	1118	1137	1070
CLOSED	1113	1065	1019	1140	1047	1165	1177	1058	1103	1105	1143	1059

Tickets Opened FY13-14
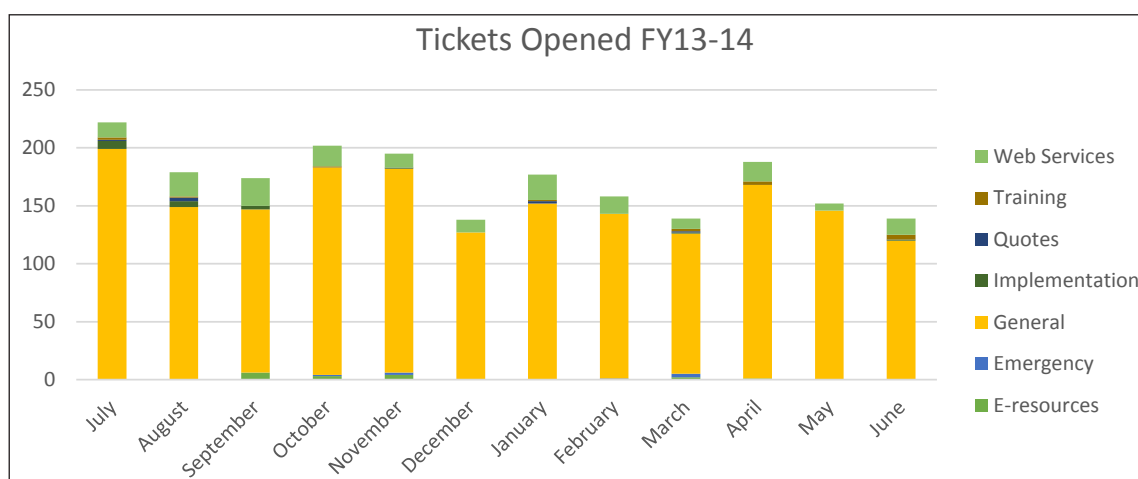
	BORROWING		
	FY 2011-2012	FY 2012-2013	FY2013-2014
Intra-Cluster Borrowing	59,292	52,522	43,913
MOBIUS Borrowing	134,148	133,340	132,099
Total Borrowing	**193,440**	**185,862**	**176,012**

	HELP DESK		
	FY 2011-2012	FY2012-2013	FY2013-2014
Tickets Opened	1,959	1,960	2,061
Tickets Closed	1,902	1,901	2,028
(Excludes Evergreen, Record Load, and Scheduler tickets)			

	UNIQUE HOLDINGS		
	FY 2011-2012	FY 2012-2013	FY2013-2014
Titles held by 1 library	6,368,353	7,357,452	7,174,263
Titles held by 2 or more libraries	3,027,190	3,258,715	1,445,702
Total	**9,395,543**	**10,616,167**	**10,577,542**
% of Unique Holdings	67.83%		

INSTITUTION	Ticket Breakdown by Institution	
	OPENED	CLOSED
A.T. Still University	48	47
Archway Cluster	17	16
Arthur Cluster	10	21
Avila University	57	57
Baptist Bible College	19	23
Camden County Library	0	0
Central Methodist University	34	34
Christian County Library	15	15
Columbia College	288	289
Conception Abbey & Seminary College	21	20
Concordia Seminary	116	119
Cottey College	79	75
Covenant Theological Seminary	92	94
Crowder College	80	83
Culver-Stockton College	23	20
Drury University	257	264
East Central College	114	115
Evangel University	40	39
Fontbonne University	273	275
Forest Institute of Professional Psychology	111	105
Galahad Cluster	43	43
Goldfarb School of Nursing	25	23
Hannibal-LaGrange University	263	263
Harris-Stowe State University	7	8
Jefferson College	79	83
Kansas City Art Institute	57	62
Kansas City Cluster	5	7
Kenrick-Glennon Seminary	0	0
LANCE Cluster	66	67
Lincoln University	40	44
Lindenwood University	583	580
State Technical College of Missouri	154	147
Logan University	55	54
Maryville University	35	34
Metropolitan Community Colleges	46	43
Midwestern Baptist Theological Seminary	83	88
Mineral Area College	31	31
Missouri Baptist University	120	122

INSTITUTION	Ticket Breakdown by Institution continued	
	OPENED	CLOSED
Missouri River Regional Library	8	5
Missouri Southern State University	347	344
Missouri State Library	14	16
Missouri State University	523	526
Missouri University of Science & Technology	541	553
Missouri Valley College	33	35
Missouri Western State University	359	349
Moberly Area Community College	40	40
North Central Missouri College	63	68
Northwest Missouri State University	559	559
Ozarks Technical Community College	172	169
Quest Cluster	82	81
Rockhurst University	117	109
Saint Louis University	16	16
Saint Paul School of Theology	30	34
Southeast Missouri State University	355	355
Southwest Baptist University	241	239
Springfield-Greene County Library	38	35
St Charles Community College	104	103
St Louis Art Museum	0	0
St Louis College of Pharmacy	19	17
St Louis Community College	190	194
State Fair Community College	48	54
Stephens College	43	47
SWAN Cluster	18	17
Three Rivers Community College	87	87
Towers Cluster	8	7
Truman State University	95	91
University of Central Missouri	223	218
University of Missouri	1194	1171
University of Missouri - Kansas City	664	661
University of Missouri - St Louis	658	660
Washington University	36	36
Webster University/Eden Theological Seminary	341	339
Westminster College	37	40
William Jewell College	135	137
William Woods University	34	26

NOTES FROM
MISSOURI EVERGREEN

"I love that we can put items on hold from other libraries!"
~Missouri Evergreen Patron

MOBIUS entered a third year contract with the Missouri State Library to host and manage the Missouri Evergreen Consortium on September 1, 2013. It was a productive and busy year. Nine member libraries of the consortium migrated onto the Evergreen ILS and began resource sharing in FY 2014—including Ozark Regional Library, which was an un-automated, eight-branch system. Five libraries joined the consortium this year: Webb City Public, Sullivan Public, Sikeston Public, Marion County Subdistrict #1, and Schuyler County. MOBIUS hired Blake Graham-Henderson, who was previously the MOBIUS System Administrator, to be the Evergreen programmer. He officially began working with Evergreen on October 1, 2013, although he started working on a few issues before that date. Blake jumped right in on learning the Evergreen database and assisting members with migrations, help desk, and much more.

It was a year where Missouri Evergreen began to mature as a consortium, setting up policies and refining bylaws. In an effort to better communicate and make decisions, the membership decided to meet monthly, rather than every other month. The Executive Committee formed several membership committees to address particular needs, such as Cataloging, OPAC, Circulation, and Publicity/PR. In coordination with the State Library and the MOBIUS staff, the Executive Committee worked to set priorities for the consortium and to begin work on strategic and financial planning. The Cataloging Committee met in person to discuss and create a cataloging policy for the consortium, which was approved at the July 2014 membership meeting. All catalogers were required to complete a free online training course in Technical Services through Idaho ABLE. The consortium also chose to add enhanced content from Syndetics to the catalog, and considered a consortial purchase of the Book-Where cataloging utility, but decided not to pursue that as a group. At the end of the year, at the June membership meeting, the consortium voted on two new Executive Committee members for three-year terms, and the Executive Committee chose new officers for the 2014-2015 fiscal year.

One big project that began during this year was catalog cleanup. With so many libraries being migrated in a relatively short period, with varying levels of cataloging expertise, and after the deduplication procedure in FY 2013, there were were some problems with item formats and bibliographic records.
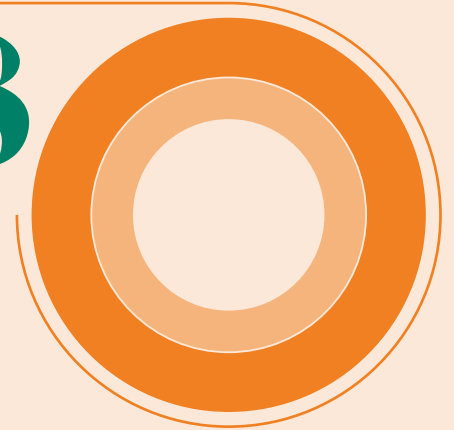
2013-2014 Executive Committee

David Doennig, Chair, Stone County Library
Terri York, Vice-Chair, Webster County Library
Karen Hayden, Secretary, Little Dixie Regional Libraries
Cathy Dame, Member-At-Large, Lebanon-Laclede County Library
Sue Lightfoot, Member-At-Large, Carrollton Public Library

210,685
PATRONS

1,315,368
ITEMS

379%
ME Borrowing Increase from FY '13

2013-2014 BORROWING & LENDING

Intra-System (Multi-Branch) Borrowing: *31,917*
Missouri Evergreen Borrowing: *30,622*
Total Borrowing: *62,539*

MISSOURI EVERGREEN (CONTINUED)

The Cataloging Committee and the MOBIUS staff worked on a plan for correcting and cleaning up the cataloging, and work began on that project (and will continue into FY 2015). The project includes a combination of software Blake develops to identify and fix records and humans looking at remaining bibs and MOLIB2GO e-book and e-audiobook records to add them to the catalog, with proper formatting so they only appear at libraries that subscribe to MOLIB2GO. Part of this script also searches for print records incorrectly attached to electronic records and corrects them.

The technology used by Missouri Evergreen also continued to evolve. We moved from Evergreen version 2.3.3 to version 2.4.0, then at the end of the year, to 2.6.1. Each of these upgrades included bug fixes and new features contributed by the larger Evergreen community. The database servers were also upgraded to Postgres 9.2, Virtual Hosts moved to Hyper-V, and SSL certificates were updated. Several virtual servers were created to better test new features, upgrades, and software.

MOBIUS Missouri Evergreen staff performed myriad tasks, including: help desk, communication with members and potential members, training, aforementioned technol-ogy upgrades, system setup and migrations, upgrades, software development, creating helpful videos, administrative tasks, visiting member and potential member libraries, creating and revising training documentation, and updating the Missouri Evergreen website. They participated in the larger Evergreen community with discussion, software patches, hosting test servers, participating on committees, and attending the annual Evergreen International Conference. A Table Talk about Missouri Evergreen also took place at the Missouri Library Association Annual Conference in October 2013, and was well attended by both current members and interested libraries. MOBIUS staff also began working on the Year Four contract with the Missouri State Library and the Executive Committee, which continues into FY2015, since the contracts begin on September 1. Since most of the current Missouri Evergreen member libraries will have migrated onto the Evergreen ILS, a new plan needed to be worked on to handle other tasks, like continued catalog cleanup, and implementation of features, such as Acquisitions.

This an exciting time to be a part of this open-source resource-sharing consortium, as it continues to grow and mature.

Missouri Evergreen Member Libraries Live as of June 30, 2014

Albany Carnegie Library
Bollinger County Library
Carrollton Public Library
Carthage Public Library
Caruthersville Public Library
Doniphan-Ripley County Library
Grundy County Jewett Norris Library
Howard County Library
Lebanon-Laclede County Library
Little Dixie Regional Libraries
Marshall Public Library
Ozark Regional Library
Poplar Bluff Public Library
Scenic Regional Library
Sikeston Public Library
Stone County Library
Sullivan Public Library
Washington Public Library
Webb City Public Library
Webster County Library

Coming Soon

Marion County Library Subdistrict #1
Neosho-Newton County Library
Schuyler County Library

STATISTICS

INSTITUTION	Missouri Evergreen Ticket Breakdown by Institution, FY 2013-2014	
	OPENED	CLOSED
Albany Carnegie Library	19	18
Bollinger County Library	8	6
Carrollton Public Library	3	4
Carthage Public Library	54	50
Caruthersville Public Library	1	1
Doniphan-Ripley County Library	13	12
Grundy County Library	5	5
Howard County Library	3	5
Lebanon-Laclede County Library	18	28
Little Dixie Regional Libraries	18	16
Marshall Public Library	13	17
MOBIUS Office	5	5
Ozark Regional Library	3	3
Poplar Bluff Public Library	26	30
Scenic Regional Library	106	88
Sikeston Public Library	1	0
Stone County Library	7	9
Sullivan Public Library	4	4
Washington Public Library	21	21
Webb City Public Library	15	13
Webster County Library	20	26
Total	**363**	**361**

	Missouri Evergreen Help Desk	
	FY 2012-2013	FY 2013-2014
Tickets Opened	276	363
Tickets Closed	252	361

ME Tickets Opened by Month FY13-14