

The logo features a large, stylized '20' in a golden, 3D font. The '0' is a solid circle, while the '2' is composed of several curved, overlapping shapes. To the right of the '20' is the word 'MOBILUS' in a large, golden, serif font. Below the '20' is the word 'YEARS' in a smaller, golden, sans-serif font. Below 'YEARS' is a golden bar containing the text '1998 - 2018' in a dark blue, sans-serif font. To the right of this bar is another golden bar containing the text 'LINKING LIBRARIES' in a dark blue, sans-serif font.

# 20 MOBILUS

YEARS

1998 - 2018 | LINKING LIBRARIES

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Celebrating 20 Years  
New Member Libraries  
MOSS & NC Cardinal

Borrowing & Lending  
Help Desk

Member Libraries  
Upcoming Launches  
Help Desk Statistics

ANNUAL REPORT  
FY **2017-2018**

MOBIUS celebrated 20 years in 2018! We held a fun filled party at our annual conference on June 4-6, 2018 at the Stoney Creek Inn, in Independence, MO. We invited as many of the original founders of MOBIUS as we could locate as well as previous staff members. We had 26 very special guests join us for our celebration. They included George Rickerson, first MOBIUS Executive Director, Martha Alexander, Rita Gulstad, Richard Coughlin, Erlene Dudley, Eldon Wallace, Shirley Baker, Valerie Darst, Mollie Dinwiddie, Sharon Upchurch, Steven Stoan, Bill Mitchell, Jim Dutton, Mark Wahrenbrock, Jenny Bossaller, Gary Harris, Megan Durham, Jennifer Parsons, Sharla Lair, Linda Vorce, Sara Parker, Bob Frizzell, Joan Clarke, Jennifer Lee, Fran Stumpf, and Ralph Caruso.

Our special guests enjoyed dinner together on Monday evening and then proceeded to a MOBIUS reception outdoors at the Stoney Creek Inn where they could listen to a jazz band, mingle and renew old acquaintances. On Tuesday morning, several of our special guests spoke at a panel presentation about how MOBIUS was formed. During the day, ten of our founding members gave video interviews about their role in helping to form MOBIUS. These videos are stored on the MOBIUS website on our 20th Anniversary page at <https://mobiusconsortium.org/20th-Anniversary>

On Tuesday, after lunch, we distributed special MOBIUS 20th anniversary pennants and went outside to have a group photo taken by a drone. It was truly a special occasion for everyone, especially for our special guests. We were all reminded how and why MOBIUS was formed and the importance it still plays in our state.

While we were planning all of our celebrations, the MOBIUS staff were busy with mergers, implementations and migrations. The MOBIUS staff seemed to be running nonstop trying to keep up with multiple projects all at the same time. Our daily

morning staff meetings became crucial to keeping us all on track. July 1, 2017 was the first year of our new contract with Innovative Interfaces which brought a new package of products to implement. There were so many, and some so complicated, it was a challenge to decide where to start. We began weekly meetings with the implementation team with Innovative to start mapping out our schedule for new product installations.

We also merged the Kansas City and Towers Clusters as part of our new contract. They went live on August 23, 2017 to become KC-Towers. This took many months of planning and implementation time. At the same time, we were also merging Quest and Lance to become Avalon. They became known as Avalon on October 18, 2017. Both were complicated projects and doing them at the same time challenged everyone involved. But, they were accomplished on time, with the dedication of some very smart people on all sides.

Southeast Missouri State University chose to become a standalone member library, leaving the Galahad cluster by July 1, 2018. Most of this migration work was completed by Innovative staff working directly with SEMO staff. This left MOBIUS with another financial challenge since standalone member libraries pay less than full cluster member libraries.

Davenport Public Library, Iowa, became our second Polaris library to join MOBIUS using the INN-Reach API. Davenport is part of the Rivershare Libraries Consortium.

The Board of Directors formed a task force to review the Membership & Assessment model this year. We had not fully recovered all the funds lost from MU's move to standalone and adding SEMO's move to standalone this coming year was adding more financial difficulties. We were also experiencing more fluctuations in the current model due to libraries doing heaving weeding, adding and deleting large ebook collections, and the

decrease in FTE for several of our institutions. Our model was based upon print lending & borrowing and our academic libraries were doing less print and more electronic. The decrease in revenue caused more stress on the model. This task force work continued on into the next fiscal year.

The Board also formed a Task Force on Consortial Digitization and Repository Software. The purpose was to pursue grant funding which might include the cost of digital asset management software for the membership, including basic hardware, and initial training for MOBIUS staff. The work continued into the next fiscal year.

The Membership approved removing the Associate Member status from our bylaws in November 2017. The Membership also approved the purchase of Linked Data at the November 2017 Membership meeting.

In December 2017, the MOBIUS Board approved a policy on Approved Integrated Library Systems and a new Eresources Policy. MOSS, MOBIUS Open Source Solutions was created and marketed. MOBIUS signed a contract with Third Chapter Partners to market the new service. MOBIUS won an Evergreen contract with NC Cardinal, a statewide public library consortium with the state of North Carolina, in November 2017.

The Third Chapter Contract also provided us with detailed ROI reports for our member libraries. These were distributed to each of our libraries in January 2018.

Ted Peterson started as a new Linux System Administrator on April 19, 2018.

Training: 19 training sessions with 65 attendees

## Revenues & Expenses

	FY2015-2016	FY2016-2017	FY2017-2018
Revenues	\$7,129,332	\$7,653,341	\$7,401,883
Expenses	\$6,945,590	\$7,341,918	\$7,258,271

# DIRECTOR'S REPORT

*Our libraries saved **\$4,410,933.88** on e-resource discounts for FY17-18.*

## BOARD OF DIRECTORS FY2017-2018

**Sharon McCaslin**  
President

**Tom Peters**  
Past-President

**Valerie Darst**  
Vice President /President-Elect

**Renee Gorrell**  
Secretary

**Kathy Hart**  
Treasurer

**Eric Deatherage**  
At-Large Member

**Lisa Farrell**  
At-Large Member

**Katie Marney**  
At-Large Member

**Laurie Hathman**  
At-Large Member

**Claudia Schoonover**  
Public Library Representative

**Barbara Reading**  
Missouri State Librarian July 1, 2017-March 31, 2018

**Robin Westphal**  
Missouri State Librarian April 1, 2018-June 30, 2018

**Donna Bacon**  
MOBIUS Executive Director

# STATISTICS - BORROWING & LENDING

## Unique Titles (Bib Records)

	FY2015-2016	FY2016-2017	FY2017-2018
Unique Titles (owned by a single library)	7,611,865	8,048,282	8,020,207
Non-Unique	3,858,443	4,005,760	4,192,250
Total Titles	11,470,308	12,054,042	12,212,457
Percent Unique	66.4%	66.8%	65.7%

## Prospector Borrowing & Lending

Prospector	FY2015-2016	FY2016-2017	FY2017-2018
MOBIUS Borrows	6,637	7,781	7,214
MOBIUS Lends	8,558	10,309	9,081

## 3 Year Borrowing

	FY2015-2016	FY2016-2017	FY2017-2018
Intra-Cluster Borrowing	36,467	31,344	30,743
MOBIUS Borrowing	146,202	156,634	146,876
TOTAL Borrowing	182,669	187,978	177,619

## INN-Reach Item Count (Total Holdings)

FY2015-2016	28,004,780
FY2016-2017	28,492,439
FY2017-2018	28,860,365

## Top Borrowers MOBIUS Union Catalog

Tulsa City-County Library	34,259
Springfield-Greene County Library	24,756
Washington University	12,319
Christian County Library	10,357
Saint Louis University	5,796

## Top Borrowers Union Catalog & Intra-Cluster

Tulsa City-County Library	34,259
Springfield-Greene County Library	24,756
Washington University	12,319
University of Missouri	11,319
Christian County Library	10,357

## Top Lenders MOBIUS Union Catalog

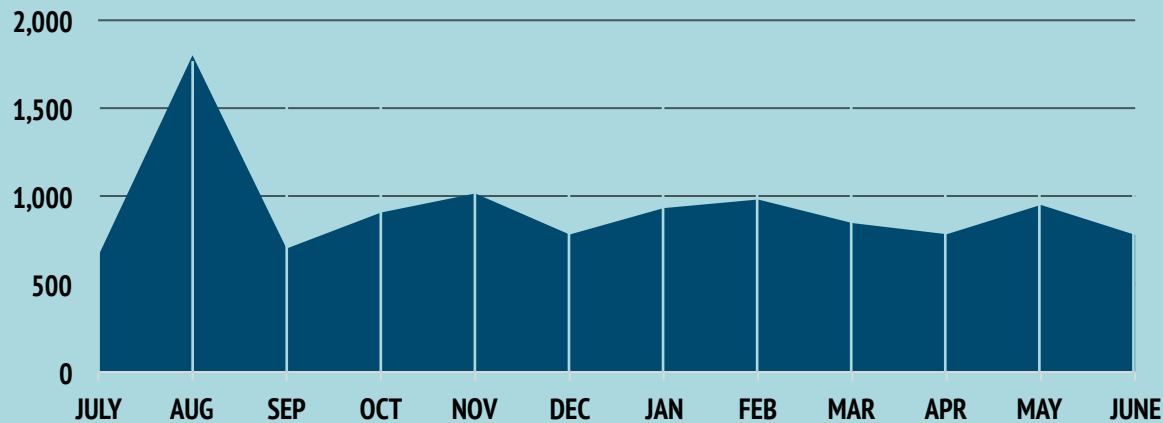
Springfield-Greene County Library	24,713
Tulsa City-County Library	13,311
University of Missouri	10,764
Washington University	9,744
Truman State University	7,435

## Top Lenders Union Catalog & Intra-Cluster

Springfield-Greene County Library	24,713
University of Missouri	17,918
Tulsa City-County Library	13,311
Washington University	9,744
University of Missouri-Kansas City	8,113

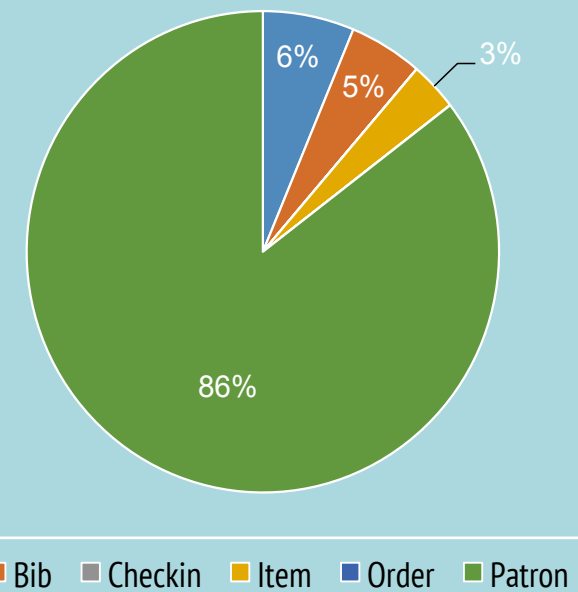
# STATISTICS - HELP DESK

TICKETS OPENED



Records Loaded By Type

Record Type	Record Count
Authority	2,728,431
Bib	2,188,412
Checkin	5,339
Item	1,428,610
Order	5,336
Patron	37,237,265
TOTAL	82,714,943



# STATISTICS - HELP DESK

## Ticket Breakdown by Institution

Institution	Total Tickets Opened		
A.T. Still University	50	Lindenwood University	520
Altoona Public Library	4	Logan University	18
Avila University	74	Maryville University	43
Baptist Bible College	47	Metropolitan Community College	31
Camden County Library	1	Midwestern Baptist Theological Seminary	81
Central Methodist University	57	Mineral Area College	55
Christian County Library	36	Missouri Baptist University	140
Columbia College	302	Missouri Botanical Garden	5
Conception Abbey	10	Missouri History Museum	14
Concordia Seminary	174	Missouri River Regional Library	12
Cottey College	94	Missouri Southern State University	361
Covenant Seminary	80	Missouri State Library	20
Crowder College	116	Missouri State University	560
Culver-Stockton College	70	Missouri University of Science & Technology	897
Drury University	386	Missouri Valley College	34
East Central College	128	Missouri Western State University	382
Evangel University	44	Moberly Area Community College	8
Fontbonne University	292	Nazarene Theological Seminary	59
Goldfarb School of Nursing	7	North Central Missouri College	65
Hannibal-LaGrange University	271	Northwest Missouri State University	589
Harris-Stowe State University	10	Ozark Christian College	85
Jefferson College	91	Ozarks Technical Community College	240
Kansas City Art Institute	30	Palmer College of Chiropractic	98
Kansas City University	11	Park University	80
Kenrick-Glennon Seminary	6	Rockhurst University	93
Lincoln University	22	Saint Louis University	23
		Saint Paul School of Theology	56
		Southeast Missouri State University	436
		Southwest Baptist University	261
		Southwestern Baptist Theological Seminary	150
		Springfield-Greene County Library	37
		St Charles Community College	78
		St Louis Art Museum	5
		St Louis College of Pharmacy	26
		St Louis Community College	149
		State Fair Community College	72
		State Technical College	162
		Stephens College	13
		Three Rivers Community College	135
		Truman State University	116
		Tulsa City-County Library	91
		University of Central Missouri	231
		University of Missouri	1013
		University of Missouri-Kansas City	1027
		University of Missouri-St Louis	693
		Washington University	23
		Webster University/Eden Seminary	351
		West Des Moines Public Library	29
		Westminster College	32
		William Woods University	42



# MISSOURI EVERGREEN - REPORT

MOBIUS entered another contract year with the Missouri State Library to host and manage the Missouri Evergreen Consortium on September 1, 2017. It was another productive and busy year and continues to be an exciting time to be a part of this open-source resource-sharing consortium, as it grows and matures. In MOBIUS FY 2018, Trails Regional, Livingston County, Douglas County, Mountain View Public, North Kansas City Public, and Riverside Regional Libraries migrated onto the Evergreen ILS to begin resource sharing. In addition, Seymour Community, Cass County, Wright County, and Camden County Libraries all joined the consortium to migrate in FY 2018 and FY 2019. Seymour Community Library was originally scheduled to migrate in June 2017, but due to fiscal reasons, delayed its migration for a year and other libraries moved up on the migration calendar. In June 2018, Missouri Evergreen comprised 43 member systems representing over 100 locations, and containing more than 2.6 million items, over 1.3 million bibliographic records, and over 530,000 patrons. According to the State Library, it represents the third largest public library system/public library consortium in the State for physical collection size and second for number of borrowers.

Missouri Evergreen continued refining and defining other policies, best practices and workflows. As a new non-profit, it continued updating its bylaws and changed the Executive Committee into an Executive Board. It also voted to expand the Board to incorporate more Members-at-Large and filled the new positions. The membership continued meeting bi-monthly, and the membership's

cataloging and circulation committees continued to meet regularly, as did the newly formed Reports Committee. Missouri Evergreen held a panel discussion for current and interested members and also met in-person at the Missouri Library Association Conference in October 2017 and held in-person meetings at the Missouri Public Library Directors meetings in December 2017 and June 2018. The consortium and MOBIUS staff continued efforts to recruit new members. Missouri Evergreen conducted its annual business meeting on June 7 in St. Louis. The membership approved bylaws changes, elected new Executive Board members, and the Executive Board chose officers for the next year. Other reports and discussion ensued relevant to the consortium. Several libraries hosted refresher trainings open to all consortium members and/or library-specific trainings for new directors and new staff members.

The consortium had set up an Authority Control Task Force to explore adding authority control to Missouri Evergreen and to set up a request for bids and evaluate the responses. The Task Force awarded the contract to MARCIVE and the process of setting, loading, and maintaining the authority files began. The Cataloging Committee continued to work with MOBIUS staff on catalog cleanup and deduplication efforts and scripting, and held another large cleanup action, along with establishing a regular deduplication process. The Circulation Committee met regularly to discuss issues and questions related to circulation staff functions. The new Reports Committee began meeting with a mission

to test and evaluate existing report templates to make recommendations for elimination, merging, renaming, and providing explanations for a new set of standard templates.

The global Evergreen community announced a major software release in October--Evergreen 3.0--which added many new features, most notably a highly scalable

## 2017-2018 EXECUTIVE COMMITTEE\*

**Steve Campbell, Chair**  
Scenic Regional Library

**Cathy Dame, Vice-Chair**  
Lebanon-Laclede County Library

**Sue Szostak, Secretary**  
Poplar Bluff Municipal Library

**Kathy Condon-Boettcher, Member-At-Large**  
Festus Public Library\*

**Rachael Grime, Member-At-Large**  
Little Dixie Regional Library\*

**Sue Lightfoot, Member-At-Large**  
Carrollton Public Library\*

**Peggy Northcraft, Member-At-Large**  
Marion County Library, Subdistrict #1

**Teresa Tidwell, Member-At-Large**  
Caruthersville Public Library

**Terri Yori, Member-At-Large**  
Webster County Library\*

\*In December 2017, the Executive Committee became the Executive Board, and officially added the Chairs of the Circulation and Cataloging Committees as ex officio members in addition to the State Librarian and MOBIUS Executive Director. In February 2018, four additional Board members were added as Members-At-Large.

# MISSOURI EVERGREEN - REPORT

web-based staff client. Missouri Evergreen upgraded to version 3.0.2 in December and got a test system set up to migrate to version 3.0.9 in early FY 2019. Missouri Evergreen was the first large consortium to upgrade to Evergreen version 3.0 so a number of bugs were identified with the web-based staff client (confirmed when other larger consortiums also upgraded) and a lot of time and attention was devoted to answering questions and figuring out solutions about the web client. MOBIUS also set up a new alerting mailing list to which the consortium members subscribed to be made aware of any potential system issues.

MOBIUS Missouri Evergreen staff continued participating in the larger Evergreen community by contributing quite a number of bug reports, bug fixes and software patches, new coding based on features requested by Missouri Evergreen members, participating in committees, adding

documentation, participating in discussions, hosting sandboxes for community "bug squashing days," serving as build master for 2.12 releases starting with 2.12.4 and for several 3.1 releases. MOBIUS also planned, hosted, and attended the Evergreen International Conference (held in early May in St. Charles, MO), which was very successful.

The annual customer services survey for FY 2017 was sent out processed in late FY 2017/early FY 2018. Results on the survey were overwhelmingly positive, with the overall average satisfaction higher than 4.5 on a scale of 5 (with 5 being very satisfied). 100% of respondents said that Missouri Evergreen support was as good as or much better than other service providers with which they have experience. Respondents rated the value of Missouri Evergreen for their patrons as 4.58 out of 5. The FY 2018 survey was sent out in May 2018 and results remained fairly consistent with 2017.

MOBIUS Missouri Evergreen staff, Blake Graham-Henderson and Debbie Luchenbill, performed myriad tasks, including: help desk; communication with members and potential members; training--on new features, at new libraries, and for new directors/staff members; aforementioned system upgrades; system setup and migrations; customized OPACs; software development; creating helpful videos; creating training documentation; administrative tasks; writing contract reports and other updates about the consortium; visiting member and potential member libraries; creating or updating report templates; and updates to the Missouri Evergreen website. MOBIUS staff also began working on the next year's contract with the Missouri State Library, which continues into FY2019.

## Missouri Evergreen Member Libraries Live (39) – as of June 30, 2018

Albany Carnegie Library	Festus Public Library	North Kansas City Public Library	Ste. Genevieve County Library
Bollinger County Library	Grundy County Jewett Norris Library	Ozark Regional Library	Stone County Library
Cameron Public Library	Howard County Library	Polk County Library	Texas County Library
Carrollton Public Library	Jefferson County Library	Poplar Bluff Municipal Library	Trails Regional Library
Carthage Public Library	Lebanon-Laclede County Library	Pulaski County Library	Washington Public Library
Caruthersville Public Library	Little Dixie Regional Libraries	Riverside Regional Library	Webb City Public Library
De Soto Public Library	Livingston County Library	Salem Public Library	Webster County Library
Doniphan-Ripley County Library	Marion County Library Subdistrict #1	Scenic Regional Library	Willow Springs Public Library
Douglas County Library	Marshall Public Library	Schuyler County Library	
Dulaney Memorial Library	Mountain View Public Library	Sikeston Public Library	

## Other Missouri Evergreen Member Libraries – as of June 30, 2018

Camden County Library  
Cass County Public Library  
Seymour Community Library  
Wright County Library

# MISSOURI EVERGREEN - HELP DESK STATS

## Missouri Evergreen Borrowing

	FY 2012-2013	FY 2013-2014	FY 2014-2015	FY 2015-2016	FY 2016-2017	FY 2017-2018
Intra-System Borrowing (Multi-Branch)	2364	23360	42233	53671	62979	94759
ME Borrowing	8169	39179	76384	93670	124248	193168
Total Borrowing	10533	62539	118617	147341	187227	287927

**54% increase** over FY2017 · **95% increase** over FY2016 · **143% increase** over FY2015 · **360% increase** over FY2014 · **2634% increase** over FY2013

## Missouri Evergreen Lending

	FY 2012-2013	FY 2013-2014	FY 2014-2015	FY 2015-2016	FY 2016-2017	FY 2017-2018
Intra-System (Multi-Branch) Lending			42287	53839	63010	96371
ME Lending			76801	94098	124780	197884
Total Lending			119088	147937	187790	294255

**57% increase** over FY2017 · **99% increase** over FY2016 · **147% increase** over FY2015

## Missouri Evergreen Help Desk

	FY 2012-2013	FY 2013-2014	FY 2014-2015	FY 2015-2016	FY 2016-2017	FY 2017-2018
Tickets Opened	276	363	576	769	664	**887
Tickets Closed	252	361	607	761	664	823

\*\*Several tickets were stalled this year, due to web client-related bugs reported to the Evergreen community and awaiting resolution there before being closed by MOBIUS.