

Description	Current Status	Prerequisites	Action
<b><i>Define and Manage Membership Growth</i></b>			
<ul style="list-style-type: none"> <li>▪ <i>Define and manage membership growth” should apply only to full members of MOBIUS (i.e. not public libraries).</i></li> </ul>			
<ul style="list-style-type: none"> <li>▪ <i>There is confusion about where MOBIUS is going, and that the decisions for “defining and managing membership growth” as an area of strategic focus had already been made. The issues that have not been clearly communicated are 1) there is not a clear definition of Cooperating Partners and the role and responsibility of the CP’s should be documented, defined, and clarified for this level of membership; 2) is the mission of MOBIUS changing—will the academic mission remain intact? De we need to rewrite the MOBIUS Mission Statement; 3) would there be a “cap” on the number of CP’s joining MOBIUS; 4) is the funding/political climate driving the move to include public libraries?</i></li> </ul>			

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<ul style="list-style-type: none"><li>▪ <i>The issue with CP's voting privileges and representation on the advisory committees needs to be addressed before the next CP is voted into MOBIUS. Should allowing each CP to have a seat, with voting, on the Access and Cataloging Advisory Committees continue? There are currently 11 clusters with one vote each. If we continue to allow CP's one vote each, in the future we may be giving up a portion of our governance. Should a CP have the same weight as, say, the MERLIN cluster with SLU and the four U of M campuses? Soon we [could] have as many CP's as clusters and the governance will be shifted. It would be better if this issue were addressed sooner rather than later. I would like to see maybe 1 vote for every 4-5 CPs. This would be similar to clusters, comprised of a number of institutions, having one vote.</i></li></ul>			

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<p><b>Initiate/participate in a statewide project designed to incorporate public libraries into a resource-sharing partnership with the MOBIUS libraries</b></p> <ul style="list-style-type: none"> <li>▪ <i>Some agree with opening MOBIUS to public libraries since it would add a richness to our collections. We realize, however, that there may also be more book requests, and we may end up being drawn into more of a public library rather than a research library mission</i></li> <li>▪ <i>Big is not always better; I sincerely hope that the public libraries enter into a cooperative venture among themselves so that we have a secure and established body with which to partner. That would certainly serve the state very effectively.</i></li> <li>▪ <i>The very first initiative..., and really almost the entire first section,...is in direct contradiction to the opening statement of “MOBIUS is...” While it may be ultimately somewhat useful to MOBIUS academic members to incorporate public libraries, it would seem that it should be considered very low priority in comparison with the many other needed initiatives included in this list which are core to the MOBIUS mission. The fact that it was placed first in the list suggests that someone has a different vision for MOBIUS than what the members themselves actually agreed to. This “mission creep”, which is really more of a “mission flood,” needs to be explicitly discussed AND APPROVED by the member institutions themselves.</i></li> <li>▪ <i>I would strongly support that the MOBIUS Executive Director, State Librarian, and MOBIUS Council representative make presentations of any cooperative plan and direction for entertaining these relationships to the appropriate groups of presidents and State agencies.</i></li> </ul>	<p>Under the aegis of the State Library, preliminary discussions underway between some public libraries and MOBIUS</p>	<p>Assessment of interest in the sector; consideration of a plan with timetable; analysis of governance issues; cost estimate; source of funding</p>	

<p><b>As records from cooperating partners and other non-MOBIUS member libraries are added to union catalog, review and refine cataloging standards and promulgate to all union catalog contributors</b></p> <ul style="list-style-type: none"> <li>▪ <i>MCDAC has some concerns regarding the standards under which Cooperating Partners are brought into MOBIUS. The current standard mentions only circulation procedures. There are no standards relating to cataloging. MCDAC believes this is a serious oversight that needs to be addressed as MOBIUS is contemplating adding more Cooperating Partners. In particular, we are concerned with authority control and, to a lesser extent, complying with documents such as the MOBIUS Subject Cataloging Policy (approved 9/8/00).</i></li> </ul> <p><i>Since the beginning of the Central Catalog, MOBIUS and the member libraries have been concerned with quality control and the cleanup of the Central Catalog. To this end, MCO has taken a number of steps: (1) Added authority records to the Central Catalog, (2) Purchased AACP, (3) Worked on deduping the Central Catalog. After working so hard to improve the quality of the Central Catalog we seem to be taking a step backwards by contemplating adding libraries that may operate under different standards.</i></p> <p><i>We are in an exciting era in library cataloging with new developments such as FRBR (Functional Requirements for Bibliographic Records), III's related searches function, etc. These tools will require more, not less, standardization, because they rely on the computer to manipulate data. For example, the "related searches" function uses the authority records to suggest other searches that a patron may wish to try. Obviously, the authority records and the information on each record must be correct for this to function.</i></p>	<p>Need is understood; standards exist</p>	<p>Define scope and details of existing problems and work toward solutions</p>	
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<p><b>Review MOU, bylaws, Cooperating Partners policy with a view towards developing an effective governance model for a broader resource-sharing community</b></p> <ul style="list-style-type: none"> <li>▪ <i>I feel very strongly that the MOU should be modified and signed off by the CEO's if any of the MOBIUS resources (staff, equipment, software, hardware) are involved in the support of these relationships/partnerships or if any money/fees are paid to either side.</i></li> </ul>	<p>Cooperating Partners policy exists, is in effect for two institutions; this initiative is perhaps better understood as part of the first one, above</p>	<p>A more developed plan for the first initiative, above</p>	
<p><b>Track and analyze lending/borrowing patterns to insure that all members are treated fairly and proportionally to their ability to serve the consortium</b></p>	<p>The tools to do this exist, by and large</p>	<p>Decisions about policy, i.e., present data to Executive Committee for discussion of possible need for action</p>	
<p><b>As resource-sharing community is expanded, explore using the CLP to facilitate sharing beyond monographs, i.e., serials and non-print media</b></p> <ul style="list-style-type: none"> <li>▪ <i>Some of our public service folks are not in favor of lending actual periodical issues or volumes. They wonder if the document is talking about doing an article-by-article type of loan within MOBIUS rather than using ILL</i></li> </ul>	<p>Discussion topic, at this point</p>	<p>Action by Executive Committee based on discussions with Council and in committees</p>	
<p><b>Explore technical feasibility and policy implications of linking the CLP to other INN-Reach systems, e.g., the Colorado Alliance</b></p>	<p>A meeting involving representatives from III, Colorado, Ohio, Oregon and Missouri is scheduled for Midwinter 2005 to discuss the concept</p>	<p>Must be technically feasible; may require funding of development by III; interest and commitment of organizations; solution to delivery</p>	

<b><i>Coordinate Cooperative Relationships</i></b>			
<ul style="list-style-type: none"> <li>▪ <i>“Coordinate Cooperative Relationships” could be for all other types of libraries, including public, library agencies, and consortia. Could rename to “Coordinate Cooperative Relationships and Partnerships.”</i></li> <li>▪ <i>The key question is “What is the relationship between MOBIUS and other organizations?” Then follows: What do these offer us? What do we offer them? Where do we want to go? How do we get there? Who are the contacts? Where is our support? How do we provide commitment to our services? How do we govern?</i></li> </ul>			
<b>Support the establishment of a formal mechanism within the State Library for coordinating database licensing in Missouri for all libraries</b>	De facto this has been done, informally	Governing bodies for MLNC, MOBIUS, MOREnet and MOSL need to formalize the informal arrangement	
<b>Actively partner with MLNC, the State Library and other entities in developing and providing services, e.g., training and conferences</b> <ul style="list-style-type: none"> <li>▪ <i>We definitely need to work with MOREnet and MLNC proactively</i></li> <li>▪ <i>Develop a marketing piece that would identify and clarify the roles and functions of all support groups across the state, i.e. MLNC, MCO, MOREnet, the State Library, as well as any other relevant organizations.</i></li> </ul>	This is, to a large extent, being done	Explicit direction to appropriate persons with respect to the specific results that are wanted; follow-up to guarantee results	

<p><b><i>Leverage Technologies to Improve Service and Reduce Duplication of Effort</i></b></p>			
<ul style="list-style-type: none"> <li>▪ <i>The “leverage technologies” section of the initiative list seems to be in fact about leveraging purchasing bureaucracy, not technologies. There is a distinct lack of vision in these documents regarding the idea of technology as anything other than buying off the shelf products from for-profit vendors. Is MOBIUS nothing more than a buying club for libraries? We claimed informally to be patterning ourselves after OhioLink, yet OhioLink has indeed actually leveraged its technological resources to provide, for instance, an internally-written openurl resolver product to all its members, customized to meet their unique needs. MOBIUS should aim for similar initiatives.</i></li> </ul>			
<ul style="list-style-type: none"> <li>▪ <i>Consider virtual conferencing, core training, open URL checkers, joint reference using software like OCLC’s Question Point</i></li> </ul>			

<p><b>Expand licensing program to include database negotiations for consortial licensing of more products currently licensed by individual members</b></p> <ul style="list-style-type: none"> <li>▪ <i>Areas in which MERAC has observed significant interest and need within the MOBIUS membership (as the for-profit market has priced itself above what most members can afford) include open url resolvers, federated searching servers, and virtual reference services.</i></li> <li>▪ <i>This section could incorporate some of the initiatives regarding non-III products discussed in the MCAG revised charge and possible activities for our committee.</i></li> </ul>	<p>MCO has licensing operation in place through the cafeteria plan</p>	<p>More information</p>	
<p><b>Pursue consortial purchasing opportunities beyond information products</b></p> <ul style="list-style-type: none"> <li>▪ <i>Maximize buying power throughout the consortium, such as exploring consortial purchasing for standing orders and electronic resources other than databases.</i></li> </ul>	<p>MCO has processes and personnel in place</p>	<p>Analysis of workload impact, procedural plan, assignment to committee</p>	
<p><b>Eliminate duplication in the union catalog</b></p>	<p>One de-duping project has been done</p>	<p>Detailed assessment and plan</p>	



<p><b>Explore benefits of and support for outsourcing copy cataloging</b></p> <ul style="list-style-type: none"> <li>▪ <i>We are reluctant to support outsourcing of copy cataloging. We already have many units cataloging. Outsourcing may create yet another hurdle to adherence to established standards. Some catalogers at existing centers are adding electronic resource URLs and dates (e.g. MERLIN catalogers). If we were to outsource this process, their efforts might be more productively channeled to materials that require greater expertise.</i></li> <li>▪ <i>Access to central database for catalogers versus “cluster only” access to records</i></li> </ul>	<p>Being investigated by individual institutions</p>	<p>More information</p>	
<p><b>Develop assessment tools and statistical information for assessment activities at the institutional level</b></p>	<p>The data is being collected</p>	<p>Definition of need, plan</p>	
<p><b>Enhance MCO website so that it is a more effective communications channel and clearinghouse for information</b></p> <ul style="list-style-type: none"> <li>▪ <i>Make better use of the MCO website to provide information such as “vital statistics”, announcements about recently posted documents/meeting minutes, and general news.</i></li> </ul>	<p>The website exists, technical capability is in place</p>	<p>Develop a process for getting user input; draft a design; solicit user comments on draft design</p>	
<p><b>Aggressively develop cooperative collection management and development programs</b></p>	<p>The MCMAC is active; the statewide approval plan trial is in progress</p>	<p>Continued support from MOBIUS members; active oversight and direction from Executive Committee</p>	

<b><i>Develop Funding Support</i></b>			
<ul style="list-style-type: none"> <li>▪ <i>We need some “moving and shaking” regarding our options for future funding and also need to acquire visible champions. MOBIUS has been a great success and our presidents and legislators probably have confidence in the members continuing this existence so see no need to spur us on. Since most of us are not allowed to lobby and do not dare compete with our own sites, it poses some challenges. Everyone is so goodhearted when it comes to adding cooperative partners, neglecting how that could be a small part of increased funding. What about grant writing and corporate support.</i></li> <li>▪ <i>Participants need to be provided communication on the status of state funding. If there are funding issues and members are faced with an increase in fees, the membership needs to be made aware well in advance.</i></li> </ul>			
<b>Seek expanded state funding to help achieve the broadening of the resource-sharing community as well as the development of new services</b> <ul style="list-style-type: none"> <li>▪ <i>This section needs some strategy for further development. “Secure” and “seek” isn’t much of a plan.</i></li> </ul>	Executive Director and Executive Committee have begun discussions; this plan is a key element for determining priorities for new funding	Completion of the planning process	
<b>Secure funding support for restoration of TOC services to MOBIUS members</b>	TOC is currently in hiatus except for individual institutions who are paying for it for themselves	New state funding	

<b><i>Develop a User-Centered Catalog</i></b>			
<ul style="list-style-type: none"> <li>▪ <i>Are there tools that already exist in Millennium that people may not be aware of that could contribute to a user-centered catalog—some we may have already paid for?</i></li> <li>▪ <i>III should continue development of FRBR to determine whether or not it can work in both the cluster and central catalog.</i></li> <li>▪ <i>Should always keep in mind the differences and needs at the cluster catalog level versus the central catalog level.</i></li> <li>▪ <i>While ease of use should be a primary focus---there will always be a constituent of users that need and want sophisticated search functionality—all must be considered.</i></li> <li>▪ <i>III has the following functions: a type of “shopping cart”, alerts, reading histories, book jacket displays, search strategy clipboards, related searches. De we already have these things? If not, can we get them, and how much do they cost?</i></li> <li>▪ <i>Concern about the ability of MCO to support these initiatives</i></li> </ul>			
<b>Work with vendors in effort to integrate article access with catalog access, i.e., enhanced federated searching</b>	Does not currently exist	Discussions with vendors on possibilities for development and deployment of tools that do what the users want	
<b>Incorporate database maintenance and authority control into the MCO services</b>	MCO has contractor who helps with database cleanup tasks	Detailed cost analysis, plan	

<p><b>Establish formal program with goal of insuring that the systems we present to users have the characteristics that users want and deliver the results users need</b></p> <ul style="list-style-type: none"> <li>▪ <i>“Amazon does some things very well but I frequently end up looking up info in a library catalog and then going to Amazon, because their searching is inadequate. They do, however, look classy and provide good linking of similar products. We need to get across to our patrons what we can do better than Amazon. The added material on Amazon (TOC, sample pages, user-contributed review) is very good and the more we can copy them in this respect, the better.”</i></li> </ul>	<p>Discussion topic</p>	<p>Appoint a Task force</p>	
<p><b>Develop online tutorials for staff and patron use</b></p>	<p>While the IUG website has tutorials, they are not specifically tailored for the MOBIUS environment</p>	<p>Definition of specific needs</p>	