

**Created by:** MOBIUS Consortium Office

**Adopted:** April 23, 2010

**Revised:**

**Replaces:** This is a new policy.

**Purpose of the policy:** To define charges for services provided by MCO.

The MOBIUS Consortium Office will charge \$50 per hour for services considered above and beyond the core services as stated in the System Service Policy. A minimum of \$50 will be charged for work requiring more than 15 minutes of staff time. Services that require research and development, or an unusual amount of time to complete due to member requests may be charged a fee. It is the decision of the MOBIUS Executive Director to determine if a fee will be charged. Time allotted to complete the service request as well as deadlines will be approved by the MOBIUS Executive Director.

An estimated quote will be submitted to members for their approval before any work is agreed upon and completed. A progress report of charges as they are incurred will be reported to the member library and any fees above and beyond what was originally quoted will be approved by the member library before work progresses. The rate of \$50 will be evaluated annually. Services that have been identified as incurring hourly charges are as follows.

### **Record Load**

Record loading requires certification from the ILS vendor and also creates a burden on the server that must be monitored centrally. A new record load implementation may include any or all of these functions:

- Retrieving and Archiving the Files
- Getting/verifying the Specifications
- Creating a new load table
- Data processing/manipulation
- Test loading of sample records for approval
- Loading of records
- Creating review files of the loaded records if requested
- Generating a headings report of the loaded records if requested
- Statistics about load provided if requested
- Archiving of statistics, headings reports, and load log
- Updating Help Desk ticket

Ongoing subsequent loads or updates will not incur a fee.

### **Modifying a Current Load Table**

Modifying current load tables, such as adding or removing MARC fields, changing the field group tags, and creating attached records, are some examples of requests that often require more than 15 minutes.

### **Outputting Records**

All institutions have the authorization to output records using Data Exchange. If assistance is required by MCO, charges will apply.

### **Authority Control Processing**

Libraries requesting that bibliographic record sets purchased from vendors be sent to Backstage for authority control will pay the direct costs from Backstage for this processing.

### **Writing a Script**

Scripts are often created to automate certain processes on the Millennium servers. At the request of an institution, MCO staff may write a script to assist the institution. Charges will apply for the development and maintenance of the script or the institution may choose to pay for the development of the script only. If script development only is chosen, MCO will give the script to the institution after development.

### **Special Projects**

When a member requests a special project, MCO will assess the task and determine the resources required, implications for other members, and under what circumstances the project or task can be completed. Special projects may include implementing products from other vendors besides the current automation vendor. An example of a special project is the implementation of Summon. The following charges have been created for all Summon implementations.

#### ***Summon Implementation & Maintenance***

MCO has developed a workflow for assisting our member libraries with Summon implementation which includes creating the Summon profile, transferring a copy of the library's database from the cluster Millennium server to Serials Solutions, and create a script to compile and output updated records from the cluster catalog for ongoing Summon maintenance. In total, MCO will spend 17 hours on this project:

- Transfer a copy of the library database to Serials Solution: 8 hours
- Create Summon maintenance script: 5 hours
- Profiling, emails, other communication: 4 hours

Based on an hourly rate of \$50 per hour, implementation fees will total to \$850. If the member library does not request the creation of a script implementation fees will decrease to \$600.

Post-implementation services relating to Summon involve daily record output and transfer from the library's server to Serials Solutions. Libraries may also elect to send their entire database on a periodic basis. Some libraries have indicated a desire to send daily updates five times per week and to send the entire database every second month. The library may elect to perform this work

on its own; to perform the work using the script created by MCO; or to have MCO perform the work. Costs for MCO services/resources relating to these updates are as follows:

Daily Updates (5/week)

- MCO outputs and transfers the records: \$2,153/year
- OR
- Member library outputs and transfers the records using MCO script: \$200/year

Bi-Monthly Updates (6/year)

- MCO outputs and transfers the records: \$2,400/year
- OR
- Member library outputs and transfers the records themselves

## **WebPAC Redesign**

In an effort to reduce costs to members and maximize consortium resources, MCO has implemented a collaborative online system (<http://github.com/mcoia>) that will allow members with the necessary technical expertise to design and develop their own WebPACs. Using this system, collaborators may retrieve the necessary files, make changes, and send the files back to MCO. MCO will then load the files into a test environment so the changes can be previewed. Once MCO has received approval, the new files will be made live on the WebPAC. WebPAC work completed through this collaboration process will not incur any charges.

For institutions who lack the necessary technical expertise, MCO can provide the following services on an hourly basis. Each institution will receive a nine hour credit of WebPAC service each fiscal year to be used for any of the charged services.

- Design - \$50/hr
- Development - \$50/hr
- Implementation of Vendor Features - \$50/hr
- Fixes - Free
- Minor Changes - Free

Each institution will receive a nine hour credit of webpac service each fiscal year to be used for any of the charged services.

### ***Design – \$50 per hour***

Changes to the look and feel of the site. Most design changes will occur in graphics files, or involve editing the sites Cascading Style Sheets (CSS). For example:

- Adding tabs
- Adding or changing buttons
- Changes to the layout

***Development-- \$50 per hour***

Changes to the functionality of the WebPAC that go beyond what III offers "out of the box". Development work often consists of writing javascript, creating templates, and other "code heavy" changes, such as adapting a feature found on another non-MOBIUS catalog.

***Implementation of Vendor Features -- \$50 per hour***

Enabling features from III and other third parties. If a new release from III enables a new feature, institutions should request the new feature within six months to have it done at no charge. If the feature is not requested within six months of MCO making the upgrade available, implementation of the feature may have a cost associated with it. An example of a III feature that was made available to everyone following a release would be the 'My Lists' feature.

***Fixes -- Free***

Items that were previously working, but are now broken or no longer working as expected. Some examples of fixes:

- Bad links
- Fields or records not displaying properly

***Minor Changes -- Free***

Any type of work (Design, Development, or Implementation) for which a task can be started and completed in less than 15 minutes. This includes any time communicating with a customer or doing necessary research. Some examples of changes that would likely be completed in less than 15 minutes:

- 1-off style changes – minor changes to look & feel
- 1-off wwwoption changes – minor changes to WebPAC settings
- Implementing changes made by a collaborator

### **Services with Fixed Fees**

Some services will be charged a fixed fee. They include:

#### **Implementation & Training for a new Member Library**

An amount of \$5,000 will be charged for implementing and training a new member library for circulation, cataloging, the OPAC, and INNReach. Additional module implementation will incur additional charges.

#### **Implementation & Training for a new Innovative module.**

A fixed fee will be given for the implementation of a new Innovative module based upon the number of hours involved to implement and train the purchasing library.

#### **Implementation & Training for a new standalone system**

A fee of \$1500 will be charged to implement and train a new standalone system for participation in the INNReach system.

**Related documents:** System Service Policy

# MOBIUS – Expenses by Category – FY10/11

Last Updated: 24 May 10

BASIC MEMBERSHIP (62)	AMT	UNION CATALOG (62)	AMT	LOCAL CATALOGS (58)	AMT	TOTAL
Personnel (2 FTE)	\$143,340	Personnel (3.5 FTE)	\$250,845	Personnel (4.5 FTE)	\$322,515	\$716,700
Office Supplies, etc. (2 FTE)	\$4,800	Office Supplies, etc. (3.5 FTE)	\$8,400	Office Supplies, etc. (4.5 FTE)	\$10,800	\$24,000
Staff Pro Devel (2 FTE)	\$3,434	Staff Pro Devel (3.5 FTE)	\$6,010	Staff Pro Devel (4.5 FTE)	\$7,727	\$17,171
Business Travel (2 FTE)	\$1,500	Business Travel (3.5 FTE)	\$2,625	Business Travel (4.5 FTE)	\$3,375	\$7,500
Human Res Services (UM) (2 FTE)	\$3,000	Human Res Services (UM) (3.5 FTE)	\$5,250	Human Res Services (UM) (4.5 FTE)	\$6,750	\$15,000
Desktop Support (MOREnet) (2 FTE)	\$1,954	Desktop Support (MOREnet) (3.5 FTE)	\$3,420	Desktop Support (MOREnet) (4.5 FTE)	\$4,397	\$9,771
Phones (2 FTE)	\$1,200	Phones (3.5 FTE)	\$2,100	Phones (4.5 FTE)	\$2,700	\$6,000
		Member Training (1/3)	\$1,731	Member Training (2/3)	\$3,463	\$5,194
		Server Support (1/2)	\$42,513	Server Support (1/2)	\$42,513	\$85,026
		Authority Control (1/2)	\$32,000	Authority Control (1/2)	\$32,000	\$64,000
		INN-REACH software maint.[1]	\$69,297	Cluster software maint. <sup>1</sup>	\$1,050,421	\$1,119,718
		INN-REACH server replacement[2]	\$3,500	Cluster server replacement <sup>2</sup>	\$75,000	\$78,500
Facilities (Rent, etc.)	\$78,741					\$78,741
Postage	\$500					\$500
PR/Marketing	\$3,000					\$3,000
Organization Memberships	\$5,805					\$5,805
Annual Conf (above grant)	\$12,000					\$12,000
Emergency Operations	\$90,000					\$90,000
Membership Meetings	\$7,400					\$7,400
Hiring Expenses	\$3,000					\$3,000
Contractual Services (Legal)	\$10,000					\$10,000
Nonprofit Status (Fees, etc.)	\$10,000					\$10,000
D&O Liability Insurance	\$5,000					\$5,000
Financial Audit	\$15,000					\$15,000
Accounting Services	\$34,000					\$34,000
<b>TOTALS</b>	<b>\$433,674</b>		<b>\$427,691</b>		<b>1,561,661</b>	<b>\$2,423,026</b>
Basic Membership (exc. Courier)	\$6,995	Cost per library based on holdings	X	Cost per lib based on formula	X	

**Expenses Split Between Categories by MCO Staff FTE:**  
MCO Salaries and Benefits (10 FTE including vacant Executive Director Position) - \$716,697; \$71,670/FTE (benefits calculated at 30% of salary; the amount of \$71,670 is an average and include both salary and benefits.)  
Office Supplies, etc. \$24,000; \$2,400/FTE  
Staff Professional Development - \$17,165; \$1,717/FTE  
Business Travel - \$7,500; \$750/FTE  
Human Resources Services - \$15,000; \$1,500/FTE  
Desktop Support - \$9,765; \$977/FTE  
Phones - \$6,000; \$600/FTE

**Expenses Split Between Union/Local Catalogs:**  
Member Training - \$5,200  
Server Support - \$85,026  
Authority Control - \$64,000

[1] Includes 5.5% increase

**Service Policy Agreement  
Between  
the MOBIUS Consortium Office  
and  
Members of the MOBIUS Consortium**

**1. Introduction and Purpose.**

1.1. Introduction.

The Missouri Coordinating Board for Higher Education, on behalf of the MOBIUS Consortium, and the University of Missouri, has executed a Host Institution Agreement that designates the University of Missouri (UM) as the host institution for the MOBIUS Consortium. In accordance with the provisions of that agreement, UM established a unit called the MOBIUS Consortium Office within the Information Technology Division to carry out the terms of the Host Institution Agreement.

1.2. Purpose.

As specified in Section 7.2 of the Host Institution Agreement between the University of Missouri and the Missouri Coordinating Board for Higher Education, the purpose of this Service Policy Agreement is to specify the direct services provided by the MOBIUS Consortium Office to the Members of the MOBIUS Consortium, to establish the standard of quality for the services provided and to specify the process by which service levels will be evaluated and reviewed. This Service Policy Agreement is, upon its signing, incorporated into the Host Institution Agreement as an amendment to that agreement.

**2. Definitions.**

2.1. MOBIUS.

The name MOBIUS refers to the consortium of Missouri academic institutions that has organized itself, under the sponsorship of the Missouri Coordinating Board for Higher Education, to pursue those goals defined in its Memorandum of Understanding.

2.2. Common Library Platform.

The Common Library Platform (CLP) is the project, jointly funded by the state of Missouri and by the members of the Consortium, to implement direct patron borrowing among Consortium members using automated library system software and hardware from one vendor.

2.3. MOREnet.

MOREnet is the internet service and network services provider for education and state government in Missouri and has been designated by the Consortium as the network services provider for the CLP.

#### 2.4. Member.

In this agreement, the label Member refers to a single institution that is a member of the Consortium.

#### 2.5. MOBIUS Consortium Office.

In this agreement, the MOBIUS Consortium Office is the unit, headed by the MOBIUS Executive Director and established by the University of Missouri within its Information Technology Division for the purpose of carrying out the provisions of the Host Institution Agreement.

### 3. Term.

The initial term of this agreement will begin on the date it is signed and extend until June 30, 2000. Thereafter it will be renewed as specified in Section 4.4 of this Agreement.

### 4. MOBIUS Systems.

#### 4.1. Definition.

The automated library systems and electronic information services described in this section of this Agreement will be known collectively, for the purposes of this Agreement, as MOBIUS systems.

#### 4.2. CLP System.

The CLP project uses integrated library system software from a vendor which is currently under contract with UM as a result of a competitive bid process. Each CLP system includes the following functional modules:

- Direct patron borrowing
- Public Access Catalog including access to remote systems and web interface
- Acquisitions
- Bibliographic maintenance (with cataloging and authority control)
- Circulation control
- Electronic reserves
- Serials control
- Management information reporting
- Materials booking
- Full standards compliance (Z39.50 and Z39.2)
- Reports modules
- Masking records capability
- URL support
- Multimedia links
- Link to serials holdings from citation databases
- Ability to load electronic databases
- Conversion support

#### 4.3. MOBIUS Databases.

The MOBIUS Consortium Office may arrange, on behalf of the Consortium, Member access to electronic information resources, including reference works, abstracting and indexing databases,



and electronic journals. In this Agreement these resources are known collectively as the MOBIUS databases. The MOBIUS Consortium will determine selection of electronic information resources.

#### 4.4. Additional Systems.

Additional automated library systems and electronic information services that are licensed for use by Consortium members are automatically added to this Agreement.

### 5. Services.

- 5.1. System Implementation. The MOBIUS Consortium Office is responsible for managing and overseeing, in cooperation with vendors and Members, all aspects of new MOBIUS system implementations, including hardware and software configuration and installation, database conversion and loading, and staff training.
- 5.2. Help Desk. The MOBIUS Consortium Office will provide help desk services to take reports of problems affecting any of the MOBIUS systems. Problem reports from Members will be accepted via telephone or e-mail. When a problem is reported, help desk personnel will document the report of the problem, investigate and analyze the problem, take action to resolve the problem if possible and report back to the reporting person.
- 5.3. Problem Tracking System. The MOBIUS Consortium Office will use an automated system for tracking and managing problem reports and projects and provide access to information from this system to Members.
- 5.4. Routine System Maintenance. The MOBIUS Consortium Office is responsible for performing all routine database and system maintenance tasks that are part of making MOBIUS systems operational. The MOBIUS Consortium Office will identify the specific routine tasks that are performed, give the schedule on which they are performed and provide statistics from the most recent instance of the task on a web site provided for Members.  
  
Other system maintenance tasks are performed as needed or on request. These tasks include maintenance of system tables, modification of system displays and the like. These tasks will be scheduled in consultation with Members and implemented at mutually acceptable times.
- 5.5. New Software Releases. The MOBIUS Consortium Office is responsible for installing new releases of software for MOBIUS systems.
- 5.6. Data Communications. Data communications capabilities between the various service locations of each Member are not covered by this Agreement. However, in the event of a data communications problem that affects a Member's ability to access MOBIUS systems, the MOBIUS Consortium Office will assist that Member in identifying and resolving the problem.
- 5.7. Training. The MOBIUS Consortium Office will develop and offer training programs for MOBIUS systems. The training programs to be developed will be determined in consultation with the Members. All training programs developed by the MOBIUS Consortium Office with respect to the MOBIUS systems will be available to any Member on request. In consultation with Members, the MOBIUS Consortium Office also will coordinate and provide support for training by vendor organizations at mutually acceptable times.
- 5.8. Documentation. All MOBIUS system user documentation purchased by or developed by the MOBIUS Consortium Office will be shared with each Member.

- 5.9. Special Projects. The MOBIUS Consortium Office will provide appropriate support and expertise in the event of special projects initiated by a Member in connection with the MOBIUS systems. An example of such a project would be the loading of a special collection of bibliographic records into the Member's catalog database.
- 5.10. Statistics. The MOBIUS Consortium Office has the responsibility to develop statistical information regarding the use of MOBIUS systems. The MOBIUS Consortium Office will make available to each Member statistical information concerning that Member's use of MOBIUS systems.
- 5.11. Vendor Relations. Because the MOBIUS Consortium Office is the primary point of contact between the Members and the vendors who provide its systems, information products and services in support of MOBIUS systems, the MOBIUS Consortium Office is responsible for such activities as advocating for Members with respect to system capabilities and modifications, RFP development, procurement management, contract negotiation and management, arranging trials of products and services, obtaining cost quotations and the like. The MOBIUS Consortium Office is responsible for helping the Members evaluate new opportunities and products.

## **6. Standards.**

### **6.1. System Availability.**

MOBIUS systems are mission critical systems for the Members. MOBIUS systems will be available to users 24 hours per day, 7 days per week. In the event that it is necessary to schedule downtime on a MOBIUS system for any reason, the MOBIUS Consortium Office will inform affected Members as far in advance as possible, but no less than 48 hours in advance, except in case of emergency over which the MOBIUS Consortium Office has no control. In case of unscheduled downtime for any MOBIUS systems, the MOBIUS Consortium Office will inform Members of the problem and expected time of resolution as soon as possible after becoming aware of the problem.

### **6.2. System Capacity.**

It is the responsibility of the MOBIUS Consortium Office to insure that the locally mounted and operated MOBIUS systems are configured appropriately in terms of memory, processors and disk storage to accommodate the needs of the Members.

### **6.3. System Response Time.**

The acceptable system response time for the CLP systems is defined in accordance with the response time specifications documented in the contract between the CLP system vendor and UM. The MOBIUS Consortium Office is responsible for insuring that these specifications are met and maintained. For other MOBIUS systems, the MOBIUS Consortium Office will endeavor to insure that system performance is at acceptable levels at all times. For remote information services, it is the responsibility of the MOBIUS Consortium Office to work with the service provider to insure adequate performance.

### **6.4. Network Capacity.**

The MOBIUS Consortium Office through MOREnet will work to insure that the networks used to deliver MOBIUS system services are appropriately configured, sized, upgraded and managed.

#### 6.5. Training Assessment

Training programs developed and offered by the MOBIUS Consortium Office will be evaluated by the MOBIUS Executive Committee on how well they meet the needs of the Members as the Members define these needs.

#### 6.6. Support.

- 6.6.1. The MOBIUS Consortium Office will provide help desk services between 8 a.m. and 5 p.m. Monday through Friday, except for official UM holidays. These hours are defined as the primary support hours. Help desk services during other hours will be available either by pager or through backup help desk arrangements with another service organization, such as MOREnet.
- 6.6.2. During the primary support hours a progress report will be provided to the affected Members 30 minutes or less following the initial problem call for problems that prevent a Member's use of a MOBIUS system or a major portion thereof or in the case of unscheduled downtime. Additional progress reports will be provided to the affected Members periodically until the problem is resolved. During other support hours, calls to the MOBIUS Help Desk will be responded to within one hour, and progress reports will be provided as during the primary support hours. Vendor support of MOBIUS systems is governed by the terms of the agreements between UM and those vendors.
- 6.6.3. Routine service requests and reports of minor system problems will be acknowledged by the MOBIUS Consortium Office and assigned to a staff person within one working day of time of receipt.

#### 6.7. New Software Releases

The MOBIUS Consortium Office will notify Members of the availability of new software releases for MOBIUS systems as soon as the information is available and will consult with Members when scheduling the installation of such releases.

#### 6.8. Special Projects.

When a Member requests a special task or project, the MOBIUS Consortium Office will assess the task, determine the resources required, and determine under what circumstances the project or task can be completed. If implementing a special project would noticeably and negatively impact services provided to other Members, the MOBIUS Consortium Office would ask the requesting Member first to inform the affected Members and then to obtain approval from the MOBIUS Consortium according to procedures established by the Consortium.

#### 6.9. Assessment and Remedies.

Section 8 of the Host Institution Agreement specifies the assessment process and remedies that apply to the Service Policy Agreement.

#### 6.10. Modification of Service Levels.

No modification of the service levels specified in this Agreement may be made without approval of the signatories to this Agreement.

APPROVED AND ACCEPTED:

For the Missouri Coordinating Board for Higher Education:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: Eldon Wallace Title: Associate Commissioner for Finance

For the MOBIUS Consortium

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: Cathye Dierberg Title: Chair, MOBIUS Executive Committee

For the MOBIUS Consortium Office

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: George Rickerson Title: Executive Director

For the University of Missouri:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: Ralph Caruso Title: Vice President for Information Technology and Systems



## **MOBIUS Task Force on Core Products and Services**

### **MEMBERS**

July 2010

Bacon, Donna – MCO (Co-Chair)  
Brumett, Renee – Springfield-Greene County Library  
Caruthers, Janet – Columbia College  
Davis, Marion – University of Central Missouri  
Dudley, Erlene – William Woods University (Co-Chair)  
Dykas, Felicity – University of Missouri-Columbia  
Logsdon, Pat – Washington University  
Mercante, Mary Ann – Maryville University  
Orzel, Linda – Harris-Stowe State College  
Ouellette, Sheila – St. Louis Community College  
Parker, Jean - St. Louis University  
Rose, Jean – St. Charles Community College  
Schweitzberger, Kathleen – University of Missouri-Kansas City  
Stumpf, Fran – Linn State Technical College

**Created by:** MOBIUS Consortium Office

**Adopted:**

**Revised:**

**Replaces:** Service Policy Agreement

**Purpose of the policy:** This policy contains the core services provided by MCO as part of the Basic membership and Assessment fees and some non-core services that may be offered by MCO.

## **Core services provided by MCO**

### **Hardware and System Maintenance Provided for MCO Managed Servers & the Union Catalog**

#### ***System Availability***

MOBIUS systems are mission critical systems for the Members. MOBIUS systems will be available to users 24 hours per day, 7 days per week.

#### ***MCO Responsibilities***

In the event that it is necessary to schedule downtime on a MOBIUS system for any reason, the MOBIUS Consortium Office will inform affected Members as far in advance as possible, but no less than 48 hours in advance, except in the case of emergency over which the MOBIUS Consortium Office has no control. In case of unscheduled downtime for any MOBIUS systems, the MOBIUS Consortium Office will inform members of the problem and expected time of resolutions as soon as possible. When possible, maintenance on MOBIUS systems will be performed during the maintenance window of Sunday from midnight to 5:00 a.m.

It is the responsibility of the MOBIUS Consortium Office to insure that the locally mounted and operated MOBIUS systems have hardware and software configured appropriately to accommodate the needs of Members and ensure appropriate response time.

#### ***Member Responsibilities***

It is the responsibility of the Members to monitor the transaction file when updating large numbers of records to insure that control (the transaction file) does not stop and inform the MOBIUS Consortium Office Help Desk when the transaction file reaches 75%.

#### ***Servers***

MCO is responsible for the acquisition, installation/implementation, and maintenance of all hardware related to the Union Catalog and MCO managed servers.

#### ***Operating Systems***

MCO is responsible for the installation and maintenance of the operating systems of the Union Catalog and the MCO managed servers.

***Backups***

MCO is responsible for running regular backups of the Union Catalog and the MCO managed servers.

**Network and Security for all Members**

*MCO Responsibilities*

MCO will work with MOREnet, UM, and other entities as defined in the Networking MOU to insure that the networks used to delivery MOBIUS system services are appropriately configured, sized, upgraded, and managed.

MCO will take appropriate steps to insure the MCO Managed Servers & the Union Catalog server remain secure and protected from physical and network compromises.

Data communication capabilities between the various service locations of each Member are not covered by this Policy. However, in the event of a data communication problem that affects a Member's ability to access MOBIUS systems, MCO will assist that Member in identifying and resolving the problem on the MOREnet network or as covered under a signed Network Access Agreement with that Member.

*Member Responsibilities*

Members are responsible for their local network access including access through their firewall to the MOBIUS system servers.

**Integrated Library System Maintenance for MCO Managed Servers & Union Catalog**

*MCO Responsibilities*

MCO is responsible for the implementation, operation, and maintenance of the ILS software.

MCO is responsible for installing new releases of the supported library system software for MOBIUS systems. MCO will notify Members of the availability of new software releases for MOBIUS systems as the information is available and will consult with Members when scheduling the installation of such releases.

MCO is the primary point of contact between the members and the vendors who provide its systems, information products and services in support of MOBIUS systems. The MOBIUS Consortium Office is therefore responsible for such activities as advocating for Members with respect to system capabilities and modifications, RFP development, procurement management, contract negotiations and management, arranging trials of products and services, obtaining cost quotations and the like. MCO is responsible for helping the Members evaluate new opportunities and products.

*Member Responsibilities*

Members will work with MCO to find a mutually acceptable installation date and time for upgrades and new software releases. Members are responsible for troubleshooting and reporting problems and bugs to MCO in a timely manner and are responsible for testing new features and enhancements.

Members are responsible for system maintenance and authorizations as outlined in the Site Coordinators Handbook.

### **Help Desk for All Members**

#### *MCO Responsibilities*

MCO will maintain a Help Desk that will receive reports of problems affecting any of the MOBIUS systems. When a problem is reported, MCO Help Desk staff will document the report of the problem, investigate and analyze the problem, take action to resolve the problem if possible, and provide status updates to the person reporting the problem.

#### **Hours**

The MCO Help Desk will provide primary support services between 8:00 a.m. and 5:00 p.m. Central Time, Monday through Friday, except for official MCO holidays. The MCO Help Desk will provide emergency support services outside of the primary support hours.

#### **Primary Support Services**

The MCO Help Desk will contact the person reporting a problem within 24 hours receipt of the report. Problems will be triaged for resolutions based on a number of factors, including the order of receipt, the severity of the problem, and the number of users affected. MCO Help Desk staff will provide periodic status updates to the person reporting the problem until the problem has been resolved.

#### **Emergency Support Services**

MCO staff will be available outside of primary support hours to troubleshoot and resolve critical problems affecting MOBIUS systems. Critical problems may include unscheduled downtime of MOBIUS systems, the inability of users to connect to MOBIUS systems, and problems preventing the immediate circulation of materials to patrons. MCO staff will receive reports of problems during emergency support hours; triage reports based on severity of the problem and the number of users affected; and undertake the resolution of critical problems immediately on receipt of the report. MCO staff will provide periodic status updates to the person reporting the problem until the problem has been resolved. Resolution of non-critical problems reported during emergency support hours will be undertaken on the next business day.

#### *Member Responsibilities*

Members are encouraged to take an active part in the troubleshooting and resolution of problems reported to the MOBIUS Consortium Office Help Desk.

Before reporting a problem to the MCO Help Desk, a member should gather as much information about the problem as possible, including (where appropriate):

Millennium Login and Initials being used when the problem occurs

The steps taken that create or lead to the problem



The expected outcome that is not occurring

Whether the problem occurs on a single or multiple workstations

Whether the problem occurs for a single or multiple Millennium logins

Relevant record numbers

Before reporting a non-critical problem (see above for examples of critical problems), a member should try to ascertain whether the problem has already been reported to MCO by another person at the member's institution or cluster.

Members are encouraged to seek regular status updates from the MCO Help Desk on their reported problems. Likewise, members are encouraged to inform the MCO Help Desk if the status of a problem changes, if the member has additional information about the problem, or if the problem is fixed locally or no longer is a problem.

#### **Routine Maintenance Operations for MCO Managed Servers & Union Catalog**

##### *MCO Responsibilities*

MCO will identify in the Site Coordinators Handbook the routine database and system maintenance tasks (RMO's) necessary for keeping MOBIUS systems operational. MCO will identify which tasks will be performed by the MOBIUS Consortium Office and which will be performed by members. The MOBIUS Consortium Office will determine and provide the schedule on which these tasks are performed and provide statistics for the most recent instance of the task performed by the MOBIUS Consortium Office.

##### *Member Responsibilities*

Members are responsible for performing the RMOs according to the schedule in the Site Coordinators Handbook.

#### **Routine Record Loads for MCO Managed Servers & Union Catalog**

##### *MCO Responsibilities*

MCO is responsible for the batch loading of records. This task is reserved to MCO due to the load certification required by the ILS vendor and the continual monitoring of the system resources required to batch load records.

##### *Member Responsibilities*

Members are responsible for providing access to the files of records, providing specifications for loads, and approving test data in a timely manner.

#### **Authority Control for MCO Managed Servers & Union Catalog**

##### *MCO Responsibilities*

MCO is responsible for negotiating and paying for authority control processing on the MCO managed servers and the union catalog.

*Member Responsibilities*

Members are responsible for maintaining authority control on the local servers, in line with the MOBIUS Policy on Authority Control.

**Training/Documentation for all Members**

MCO will develop and offer training programs. MCO also will coordinate and provide for training by vendor organizations.

**Courier Service for all Members**

*MCO Responsibilities*

MCO is responsible for contracting with a statewide courier service. This contract will provide 5 days per week service at one pickup location for each institution. Additional stops will be charged directly to the institutions by MCO.

MCO is responsible for all billing and communication with the courier.

*Member Responsibilities*

Members are responsible for submitting days closed to MOBIUS.

Members are responsible for working with the MOBIUS Access Advisory Group to suggest courier policies and procedures to the MOBIUS Board of Directors.

**Annual Conference for all Members**

MCO will plan and operate an annual conference for its members as funding and grants allow.

**Statistics for all Members**

*MCO Responsibilities*

MCO will provide a lending and borrowing statistics report and post it to the website on a monthly basis.

*Member Responsibilities*

Members are responsible for providing traditional ILL stats for the lending and borrowing statistical report.

**New Member or New Module Implementation for all Members**

*MCO Responsibilities*

MCO is responsible for the implementation and training of new members and current members receiving new modules and for determining any associated fees.

*Member Responsibilities*

Members will work directly with MCO for implementation and training.

**Union Catalog and Consortial Borrowing for all Members**

MCO is responsible for the operation and maintenance of the union catalog server.

MCO is responsible for providing and maintaining the ability to do direct consortial borrowing.

**Consortial Communications/Support for all Members**

MCO will host and maintain a website and discussion lists for its members and groups.

MCO is responsible for maintaining access to consortial documents on the website.

MCO is responsible for providing online access for meetings and webinars.

MCO is responsible for all communications concerning operation and funding as required by law.

**Additional services that may be provided by MCO but are not considered core**

**Consortial Contracts**

MCO may negotiate consortial contracts on behalf of members, such as the YBP contract for collection development.

**E-Resources**

MCO may negotiate consortial contracts for E-Resources.

MCO is responsible for assisting members with trouble-shooting access to E-Resources provided through consortial contracts

**Special Projects**

Members may contract with MCO for special projects as outlined in the Charges for Services Policy.

**Related documents:** Charges for Services Policy, Network Access Agreement, MOBIUS Policy on Authority Control, MOBIUS Site Coordinator's Handbook



## **MOBIUS Task Force on Core Services and Products**

### **CHARGE**

**Adopted:** [date]

**Revised:** [date]

**Type of Committee:** Task Force

**Charge:** The Task Force will complete the following tasks: 1) Review the Service Policy Agreement dated 26 Feb 1999; 2) identify “core” products and services that are included as part of MOBIUS membership fees and assessments; 3) identify categories of products and services that are not considered “core;” 4) recommend pricing method and process for non-core products and services; 5) state conclusions in policy form.

**Statement of reporting structure.** All proposed policies and other recommendations must be submitted to the MOBIUS Executive Committee for approval by **September 1, 2010**.

**Membership:** Any employee from a MOBIUS member library who meets the qualifications is eligible for appointment; appointments to the task force will be made by the chair of the MOBIUS Executive Committee by June 4, 2010 with the approval of the Executive Committee. Donna Bacon, MOBIUS Interim Executive Director, will chair this task force.

**Member qualifications:** Members should be knowledgeable about MOBIUS products and services, including how both INN-Reach and local/cluster catalogs operate; have some experience/responsibility for system implementation at the local library level; have some knowledge of emerging technologies; have the ability to view issues from both the user and system-provider perspective.

**Membership Restrictions:** None

**Frequency of Meetings:** One in-person meeting; possibility of meetings via GoToMeeting

**Committee Discussion List:** None

**Communication of the Committee Minutes:** Notification of meetings must be posted to the MOBIUS web calendar two weeks prior to the date of the meeting. Minutes of the meetings must be submitted to the MOBIUS Online Help Desk for posting on the MOBIUS web site within 30 days of each meeting and are accessible to any person with the proper MOBIUS permissions. Notification of posting will be sent to the appropriate consortium listserv.

**Output:** The Task Force will submit draft policy(ies) to the Executive Committee by September 1, 2010.