MOBIUS Library Consortium

Strategic Plan

July 1, 2012-June 30, 2015

Strategic Planning Task Force Members:

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***MOBIUS Mission****: MOBIUS member organizations collaborate to provide quality information resources and services to the people of Missouri.*

***MOBIUS Vision****: MOBIUS aspires to be: a preferred gateway to quality information resources for all Missouri citizens without direct costs to end users; a member organization, responsive to the dynamic nature of the global information environment and the challenges of ever-changing technology; a full partner with agencies and information organizations to promote and facilitate learning, personal development, and economic well-being through timely access to quality information; and a community asset that supports the development of educational, cultural, and social values.*

**Key Assumptions:**

* Staff development and engagement will be built into each of the priorities.
* Communication will be a priority between MOBIUS Consortium staff and MOBIUS members.
* Collaborative working relationships will be pursued to encourage cooperation with other entities.
* Grants and other sources of funding will be sought to accomplish major projects.
* The Strategic Plan will be tied into the financial planning for MOBIUS activities.

**Goal 1: MOBIUS will adopt a broader definition of membership**

**Key Results:**

* Continue to expand the depth and richness of resources available in the MOBIUS Union Catalog
* Create financially feasible practices for a wide variety of libraries to be members of MOBIUS

**Tasks and Milestones**

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| **Year 1: July 1, 2012-June 30, 2013** | **Year 2: July 1, 2013-June 30, 2014** | **Year 3: July 1, 2014-June 30, 2015** |
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| Continue exploring options to connect disparate systems to the union catalog***ACTIVITY:***Several meetings with Mid-Continent and KC Public Library occurred over the past year. Mid-Continent wanted NCIP development completed by Sirsi-Dynix which would allow real time transactions on DCB. This was completed but is now stalled by Mid-Continent due to other projects. | Implement library resource sharing across state lines***ACTIVITY:***\*\*Donna meets with Tulsa City-County Library in June 2013\*\*Donna & Steve meet with the Alliance in Oct 2013\*\*Donna & Steve meet with III libraries in Arkansas\*\*November Membership Meeting—Alliance partnership approved\*\*Board approves Tulsa at Feb 14, 2013 meeting | Continue to assess staffing workload and services expected by libraries |
| Explore creative financial models for library participation in MOBIUS***ACTIVITY:***\*\*Bylaws were amended by membership to add Associate Membership.\*\*Assessment model reviewed for all types of membership. | Explore expanding relationships with special libraries***ACTIVITY:***Donna talks to Renee Gorrell at Goldfarb about medical library membership—Renee is Board member of MO Medical Library Association—Renee will explore | Continue assessing and evaluating Milestones for years 1 and 2 |
| Begin conversations with libraries beyond state lines***ACTIVITY:***\*\*Began conversation with academic libraries in KC area with considerable assistance by the KC Cluster Directors. Some are in Kansas. Discounted quotes from Innovative received and serious interest by all has been noted. \*\*Waiting on interested libraries to plan new budget year and talk with administrations.\*\*Conversations with Director at Central Arkansas Library about connecting InnReach systems for area Innovative libraries in Arkansas. Negotiations continuing\*\*Visited Tulsa-City County Library about MOBIUS membership. They would be a standalone. They are seriously interesting in joining in Spring 2014. |  | Evaluate projects accomplished in year 1 and 2 |
| Implement Evergreen for the Public Library Consortium***ACTIVITY:***\*\*MOBIUS signed contract with Missouri State Library to implement and host the Missouri Evergreen system on March 1, 2012. Implemented 4 libraries by August 31, 2012. \*\*Contract signed again for September 1, 2012 to August 31, 2013. A total of 11 libraries migrated to ME by end of contract date. \*\*MOBIUS hired a Missouri Evergreen Coordinator in August 2012 which is funded by the Missouri State Library contract. A Missouri Evergreen Programmer position posted but not filled. \*\*3 new libraries sign MOU to join for next contract cycle.  |  |  |

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| **Goal 2: MOBIUS will enhance resource sharing** |

**Key Results:**

* Implement a true discovery tool for the MOBIUS union catalog
* Cooperative purchasing of collections
* Share alternative formats

**Tasks and Milestones**

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| **Year 1: July 1, 2012-June 30, 2013**  | **Year 2: July 1, 2013-June 30, 2014** | **Year 3: July 1, 2014-June 30, 2015** |
| Investigate options for making the union catalog a more user friendly discovery tool***ACTIVITY:***MOBIUS received a quote for Encore for the Union Catalog in November 2012. Quote is too high. A new quote is received as part of renegotiations with Innovative on pricing and presenting to the membership at their September 13, 2013 retreat. | Pursue union catalog discovery tool***ACTIVITY:*** Encore “purchased” from Innovative for MOBIUS Union Catalog | Implement union catalog discovery tool |
| Enriched content in the MOBIUS union catalog***ACTIVITY:***A quote for Syndetics for the Union Catalog is received and referred to MCDAC for approval. Board approves Syndetics subscription at October, 2012 meeting. Syndetics goes live on December 12, 2012. | Expand database cafeteria program***ACTIVITY:***Number of eresources available expands from 12 to 69 | Evaluate courier options |
| Assign a Board Task Force on AV lending policies**ACTIVITY:**\*\*Board asks MAAC to form a AV Sub-Group in August 2012. \*\*AV Sub-Group meets and creates a timeline in September 2012. \*\*Membership is surveyed by AV lending in November 2012.((Board approves proposal for AV lending at May 2013 meeting. \*\*AV lending begins implementation July 1, 2013. | Pursue licensing and consortial purchasing of e-books and other products and services used within the consortium***ACTIVITY:***A year long evaluation process for ebooks is completed with the subscription to EBSCO ebooks for all but 8 member libraries.  | Revisit circulation policies to align new members and systems |
|  | Assign a Board Task Force on cooperative collection development***ACTIVITY:***Board assigns a task force with Tom Peters as Chair—Feb 2013 |  |
|  | Integrate Evergreen Public Library Consortium program into MOBIUS enhanced resource efforts***ACTIVITY:***Missouri Evergreen libraries are not ready to join MOBIUS—they still need more time to form their own policies & procedures |  |

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| **Goal 3: MOBIUS will strengthen funding streams and fiscal viability** |

**Key Results:**

* MOBIUS is a financially sound non-profit corporation
* MOBIUS is aware of grant opportunities to fund projects
* The Finance Committee reviews assessment model and charges for special services
* MOBIUS evaluates, reviews, and modifies the assessment model to support expanded membership

**Tasks and Milestones**

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| **Year 1: July 1, 2012-June 30, 2013** | **Year 2: July 1, 2013-June 30, 2014** | **Year 3: July 1, 2014-June 30, 2015** |
| Monitor and evaluate investment plan**ACTIVITY:**MOBIUS Finance Committee met with our Investment Team at Commerce Bank to evaluate our investment plan. No changes were made. | Continue to investigate new revenue streams***ACTIVITY:***\*\*New membership (especially standalone members are the best way to increase revenue streams)—Donna continues to talk to KC libraries\*\*St. Louis Research Library Consortium agrees to become the 11th Cluster-June 2014\*\*Missouri Evergreen implementation charges begin a 5 year revenue stream | Review financial policies of MOBIUS and update as needed |
| Review assessment model and revise as necessary**ACTIVITY:**\*\*Board appointed a Task Force at September 2012 meeting.\*\*Assessment Video created to gather input from membership in August 2012.\*\*New assessment model presented and approved by Board at December 2012 meeting.  | Monitor fees charged for services to maintain fiscally viability***ACTIVITY:***This is a continuous process. Fees charged for services is a very low revenue stream. |  |

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| **Goal 4: MOBIUS will provide training to meet the needs of membership and MOBIUS staff** |

**Key Results:**

* MOBIUS staff and membership have access to training in the use of MOBIUS products and services
* The budget supports ongoing training for MOBIUS staff and membership

**Tasks and Milestones**

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| **Year 1: July 1, 2012-June 30, 2013** | **Year 2: July 1, 2013-June 30, 2014** | **Year 3: July 1, 2014-June 30, 2015** |
| Carry out Sierra training for staff and members**ACTIVITY:**\*\*Implementation plan sent to membership on November 9, 2012.\*\*Sierra information posted to MOBIUS website in November 2012.\*\*Sierra Discussion List created in November 2012.\*\*No formal training conducted for Sierra. Tutorials made by other Sierra sites shared with membership. | Develop training partnerships with other entities***ACTIVITY:***\*\*MOBIUS hosts LJ Lead the Change Seminar at 2013 MOBIUS Annual Conference—over 100 attend\*\*Missouri Training Institute conducts a full day session on Motivating Employees at 2014 MOBIUS Annual Conference | Continually plan and develop new training opportunities for members and MOBIUS staff |
| Evaluate further member library training needs **ACTIVITY:**\*\*Coordinated group participation in 2012 ALA Virtual Conference (15 participants)\*\*Coordinated Lead the Change! Program\*\*Coordinated multiple regional RDA training sessions.\*\*Negotiated 20% discount with Library Juice Academy | Explore the possibility of MOBIUS purchasing the rights to specific webinars***ACTIVITY:***Discounts on ALA Virtual Conference & Library Juice Academy offered |  |
| Explore training delivery methods and collect data on effectiveness of training method**ACTIVITY:**Developed new evaluation form for training sessions. | Re-purpose or refocus the Annual Conference to include new members and new MOBIUS service uses***ACTIVITY:***Create tracks, dine-arounds, eliminate evening keynote & add keynotes to tracks |  |
| Market training opportunities**ACTIVITY:**\*\*Created schedule for announcing training opportunities.\*\*Increased use of MOBIUS and MLA listservs as well as MO INFO for marketing training. | Establish budget for staff training***ACTIVITY:***A budget is already established. Staff training managed by Executive Director. Board supports continued professional development. |  |

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| **Goal 5: MOBIUS will develop staffing priorities for continued operation and new projects** |

**Key Results:**

* Staffing is sufficient to support members efficiently and effectively
* Staff skills are developed and specialized tasks are outsourced as needed
* Staffing levels and skill sets are appropriate to the needs of the members
* MOBIUS staff are responsible for security and management of computer systems
* Participating libraries are informed of MOBIUS activities

**Tasks and Milestones**

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| **Year 1: July 1, 2012-June 30, 2013** | **Year 2: July 1, 2013-June 30, 2014** | **Year 3: July 1, 2014-June 30, 2015** |
| Appoint a Board Committee to investigate HR options**ACTIVITY:**\*\*Board appoints Committee at August 2012 meeting.\*\*Donna & Valerie hire a HR consultant in August 2012.\*\*Board votes to transition to managing our own HR by July 1, 2014.\*\*Donna informs Gary Allen of decision in early Fall, 2012.\*\*Quotes received for medical benefits in September 2012.\*\*Retirement options evaluated in January 2012. \*\*HR consultant starts writing HR Policies & Procedures end of fiscal year 2013.  | Implement the recommendations of the Board Committee on HR options***ACTIVITY:***\*\*HR Committee hires and begins work with HR Consultant, writes full policy manual approved by Board in May 2014\*\*Benefits/Retirement options are evaluated with Insurance & Retirement Consultants—Board approves new benefits in May 2014\*\*Payroll is outsourced to Columbia EDP | Continue to study staffing needs as the Consortium grows |
| Assess the inclusion of Evergreen staff into MOBIUS**ACTIVITY:**\*\*An Evergreen Coordinator is hired in August 2012. Position is paid by Missouri State Library contract.\*\*An Evergreen Programmer position is posted but not filled. | Explore additional avenues/methods of communication and marketing ***ACTIVITY:***No new methods are identified beyond the new communication plan which is put into place this year. |  |
| Evaluate necessary skill sets for personnel**ACTIVITY:**PerformSmart, a HR tool, is purchased to assist with MOBIUS staff performance evaluations.  |  |  |

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| **Goal 6: MOBIUS will support research and development of technologies** |

**Key Results:**

* MOBIUS is nimble and adapts to new technologies
* MOBIUS staff are knowledgeable about evolving trends and technology and proactive in assisting members in implementing library technologies

**Tasks and Milestones**

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| **Year 1: July 1, 2012-June 30, 2013** | **Year 2: July 1, 2013-June 30, 2014** | **Year 3: July 1, 2014-June 30, 2015** |
| Implement Sierra**ACTIVITY:**\*\*Getting Started information posted to MOBIUS website. \*\*Sierra discussion list implemented.\*\*Tutorials from other Sierra sites shared with membership.\*\*Sierra implemented on all Cluster servers except MERLIN in February 2013. | Explore mobile technology for the MOBIUS union catalog***ACTIVITY:***Postponed to Year 3 | Review all online catalogs in the system and encourage updates |
| Fully utilize the new architecture of Sierra**Activity:**\*\*Justin started evaluating the new architecture (PostGres).\*\*Most of the enhancements we want are still in development.  | Evaluate the effectiveness of the existing website and make recommendations for improvements through a MOBIUS website Task Force***ACTIVITY:***Postponed to Year 3 |  |
| Fully exploit the new architecture of Evergreen to meet the needs of the Evergreen libraries**ACTIVITY:**An Evergreen programmer position was posted but not filled. Expectations were for this employee to develop enhancements and more for Missouri Evergreen. This goal will be explored when the position is filled. |  |  |

**Goal 7: MOBIUS will communicate effectively with membership and other external constituencies**

**Key Results:**

* MOBIUS will have a communications plan for membership
* MOBIUS will have a communications plan for external constituencies

**Tasks and Milestones**

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| **Year 1: July 1, 2012-June 30, 2013** | **Year 2: July 1, 2013-June 30-2014** | **Year 3: July 1, 2014-June 30, 2015** |
| Develop a Mobius membership communications plan**ACTIVITY:**\*\*Board appoints a committee to write a Communication Plan.\*\*Plan proposed and approved at the Board December 2012 meeting.\*\*Plan sent to MOBIUS Users Discussion List and posted to the MOBIUS web site. | Implement the MOBIUS membership communications plan***ACTIVITY:***\*\*Board President emails summary of each Board meeting to membership\*\*A Director’s Retreat is held & a SWOT Analysis is completed—Sept 13, 2013 | Evaluate the MOBIUS membership communications plan |
| Develop a MOBIUS communications plan for external constituencies**ACTIVITY:**This plan was included in the general Communication Plan approved by the Board in December 2012. | Implement the MOBIUS communications plan for external constituencies***ACTIVITY:***\*\*Executive Director communicates with MOBIUS-Users, MOBIUS-L, and MLA when appropriate\*\*News is submitted to MLA newsletter\*\*III releases a PSA about MOBIUS & the Alliance partnership | Evaluate the MOBIUS communications plan for external constituencies |