Long-Range Plan
For
MOBIUS

The MOBIUS organization emerged from an effort to create a statewide Missouri academic library union catalog and resource-sharing system. One such system—Miracl—was already in operation involving two private universities and the University of Missouri.

With the lead provided by Missouri Public Academic Library Administrators (MPALA) and the Missouri State Coordinating Board for Higher Education (MCBHE), the MOBIUS project sought and received funding for fiscal years 1999, 2000, and 2001. A major element of the planning process was the feasibility and cost study the MPALA and MCBHE supported. The study indicated that a cost-effective base for development of a statewide Missouri academic library information and access capability existed in the Miracl system. The plan called for the Common Library Platform—the name used to describe the technology base for the system—to grow out of Miracl, and to provide support for all Missouri academic libraries, whether public or privately funded.

The support provided by the Missouri General Assembly permitted the MOBIUS organization to begin a three-year project to apply modern library and information services technology to every academic library in Missouri.

The features and benefits of the Common Library Platform (CLP) are numerous:

- Access to every academic library's materials and catalog regardless of location.
- Direct and immediate borrowing and lending support, regardless of the location of the patron or the materials to be borrowed.
- A unified and common public interface based on familiar and standard World Wide Web technology.
- Support for access from homes, dormitories, faculty offices, and any place that has WWW connectivity.
- A common database of all libraries' materials, permitting statistical and management reports to be applied on individual libraries, clusters of libraries, or on a statewide basis.

Background To the Long-Range Plan

MOBIUS has developed rapidly, and has succeeded in implementing a unique statewide academic library system incorporating libraries in both public and private institutions of higher education. Approximately 60 percent of the startup work is complete, with the remainder of the initially-planned-for "clusters" of libraries scheduled for installation by mid-2002.

MOBIUS requires a Long-Range Plan to guide the organization's development of policies and services for the three-year period beginning in July 2001 and concluding at the end of June 2004.

This document includes Goals and Objectives organized into three major goal areas:

- Technical matters
- Services matters
- Planning and Administrative matters

Each of the Goal areas contains Goal Statements, and each Goal Statement contains several Objectives. Each Objective has start and end dates included. [REVIEW NOTE: In most cases, this draft does not contain timeline information; these will be matters for discussion at the Long-Range Plan review meeting on April 26.] The Goals and Objectives are ambitious but achievable, as MOBIUS has already shown itself to be accomplished and capable.

Current Status of MOBIUS

The MOBIUS Coordinating Office's staff, as well as the MOBIUS member libraries being converted to the INN-Reach software product in use in Missouri, are all working at nearly full capacity at the time this plan is being prepared.

The primary focus of all parties is in meeting implementation targets for the second and third years of MOBIUS' operational work. The implementation work includes the following:

- Converting data from libraries not yet using the MOBIUS Common Library Platform to full MOBIUS operation.
- Training staff of libraries new to the CLP.
- Planning for more services and members.

Of the eleven clusters, or groups of Missouri academic libraries that will share automated library systems, six are in full operation, and the other five are in various states of preparation and operation.

When the Common Library Platform is complete, eleven separate systems will be in use, each linked to a shared common database. The target date for completing all CLP implementation and having all eleven clusters in full operation is July 2002.

Issues Emerging from Planning Retreat: MOBIUS Services and Planning Focus

The MOBIUS Long-Range Planning Committee met in a planning retreat October 24–25, 2000, with the specific target of developing priorities and focus points for a Long-Range Plan. The LRPC identified a brief list of "Must Do Items" that form the core of this Plan.

Must Do Items

1. MOBIUS must use technology that is robust, reliable, and standards-based. MOBIUS, the MOBIUS Consortium Office (MCO), and MOBIUS members will ensure accomplishing this item by conducting a constant scan of the technology environment.

2. MOBIUS will engage in planning on an ongoing basis, with the LRPC and the MCO charged with an annual update to and review of the MOBIUS Long-Range Plan.

3. MOBIUS will provide technology-based services that respond to the needs of the MOBIUS membership, including:

   - The Common Library Platform.
   - Electronic Information and Licensing.
   - Distance Learning Support, such as:
     - Courier service
     - Remote access to MOBIUS
     - A mediated World Wide Web "scholar's portal" for MOBIUS.

4. MOBIUS will conduct a needs assessment regarding remote and compact storage, as part of an annual scan of needs associated with Long-Range Planning.

5. MOBIUS will conduct surveys of member to assess needs and expectations.

6. Develop and use a Service Level Agreement to document services and their assessment guidelines and process.

Securing MOBIUS's Success

The Long-Range Planning Committee felt that successful efforts in the following tasks will ensure that MOBIUS succeeds as a service organization.

1. Secure recurring appropriations from the Legislature.

2. Build a team to hold MOBIUS together.

3. Provide effective training for MOBIUS members.

4. Foster internal trust and external credibility by promoting and communicating shared vision and values.

Membership

The Long-Range Planning Committee approved the following language regarding expansion of membership in MOBIUS.

> "MOBIUS is an organization of accredited Missouri institutions of higher education, whose original goal and current primary focus is the implementation of the Common Library Platform and the provision of electronic information in support of higher education."

Proposed Plan: Focus, Priorities, and Timeline

The timeline of planning activities for this initial Long-Range Plan will be the three years between July 1, 2001, and June 30, 2004.

This Plan incorporates and emphasizes the priorities expressed in the Long Range Planning Committee Retreat. The Plan divides those priorities into three broad categories. These are Technology, Services, and Administration and Planning.

Technology

The Plan emphasizes these overall Technology goals.

Technology Goal Statement 1 (T1): MOBIUS will provide technology-based services, emphasizing the Common Library Platform as the primary mechanism for delivering those services.

Technology Objectives: T1

T1.1. MOBIUS will meet current commitments to clusters that are in development or planned for completion.

Start Date: Continues

End Date: July 2002

T1.2 MOBIUS will continue to support standards-based technology in hardware and networking.

Start Date:

End Date:

T1.3 MOBIUS will remain current with the Innovative Interfaces INN-Reach software, including making use of new development.

Start Date:

End Date:

T1.4 MOBIUS will provide Remote Access to the Common Library Platform, particularly as Remote Access supports Distance Learning.

Start Date: Qtr 4 2001

End Date:

Technology Goal Statement 2 (T2): MOBIUS will provide specialized technology-based services such as access software and electronic database subscriptions.

Technology Objectives: T2

T2.1 MOBIUS will develop and support other electronic resources including a mediated Scholar's Portal to the Internet.

Start Date: Qtr 3 2001

End Date:

T2.2 MOBIUS will support electronic licensing for academic electronic databases, while not replicating those services provided in a cost-effective manner by MORENet or other providers.

Start Date:

End Date:

Services

The Plan will emphasize these overall Services goals.

Services Goal Statement 1 (S1): MOBIUS will provide quality training, data conversion, and operational support to current and committed member libraries.

Services Objectives: S1

S1.1. MOBIUS will provide both one-time and ongoing training for new and current MOBIUS member libraries.

Start Date:

End Date:

S1.2. MOBIUS will provide conversion of data from existing automated systems to the Common Library Platform for new MOBIUS members.

Start Date:

End Date:

S1.3. MOBIUS will provide ongoing operational support for new and current MOBIUS member libraries, with qualified staff, resources, and technology.

Start Date:

End Date:

Services Goal Statement 2 (S2): MOBIUS will support Distance Learning as an extension of the CLP.

Services Objectives: S2

S2.1. MOBIUS will provide connectivity to the CLP for Distance Learning services providers, and will create specialized indexes, formats, and catalogs for DL courses.

Start Date:

End Date:

S2.2. MOBIUS will facilitate delivery of materials requested for Distance Education courses. See S3.1.

Start Date:

End Date:

Services Goal Statement 3 (S3): MOBIUS will provide courier service to support materials delivery.

Services Objectives: S3

S3.1. MOBIUS will provide courier service to and from every MOBIUS member site at least twice each week to pick up and deliver materials borrowed using the CLP.

Start Date:

End Date:

S3.2. MOBIUS will modify the CLP to create special messages and services related to courier service, and will permit couriers access to the CLP to facilitate pickup and delivery.

Start Date:

End Date:

Services Goal Statement 4 (S4): MOBIUS will license electronic subscriptions and databases. (Services side of a Technology goal.)

Services Objectives: S4

S4.1. MOBIUS will contract with database providers to develop cost-effective subscriptions for MOBIUS member libraries.

Start Date:

End Date:

S4.2. MOBIUS will support access control and license management software where those products operate in conjunction with electronic databases.

Start Date:

End Date:

S4.3. MOBIUS will support remote access to electronic databases for qualified users, and will provide proxy or remote access facilitation and control.

Start Date:

End Date:

Services Goal Statement 5 (S5): MOBIUS will communicate with and involve MOBIUS members and the larger Missouri library community in services development.

Services Objectives: S5

S5.1. MOBIUS will conduct its services development planning in open and documented processes, and will invite all MOBIUS members and advisory personnel to participate in services development planning.

Start Date:

End Date:

S5.2. MOBIUS will include details of its services development for public access in newsletters, Web documents, and public presentations.

Start Date:

End Date:

Planning and Administrative

The Plans section on Planning and Administrative emphasizes these goals.

Planning and Administrative Goal Statement 1 (P1): MOBIUS will conduct planning as an ongoing effort, not just one-time plan development.

Planning and Administrative Objectives: P1

P1.1. MOBIUS will support annual planning as an integral part of its operations, and MOBIUS plans will be public documents.

Start Date:

End Date:

P1.2. MOBIUS will solicit input from non-member libraries and other agencies as part of its planning processes.

Start Date:

End Date:

Planning and Administrative Goal Statement 2 (P2): MOBIUS will conduct member needs assessments on a recurring basis.

Planning and Administrative Objectives: P2

P2.1. As part of its annual planning, MOBIUS will solicit input from its members regarding their information technology and delivery needs. The methods for soliciting input will include statistical and narrative processes that provide direct input to annual planning.

Start Date:

End Date:

P2.2. MOBIUS will experiment with and ultimately implement Web-based survey techniques for needs assessment. The survey results will become part of a database of member information.

Start Date:

End Date:

Planning and Administrative Goal Statement 3 (P3): MOBIUS will secure a solid base of funding from the Missouri legislature.

Planning and Administrative Objectives: P3

P3.1. MOBIUS will communicate its goals, objectives, and successes to Missouri's legislative and executive branches of government, to ensure that government understands the value of MOBIUS services.

Start Date:

End Date:

P3.2. MOBIUS will meet with and advise legislative and executive branch members and staff to promote a dedicated stream of funds for MOBIUS.

Start Date:

End Date:

Planning and Administrative Goal Statement 4 (P4): MOBIUS will involve the Missouri library community in communicating MOBIUS plans and activities.

Planning and Administrative Objectives: P4

P4.1. MOBIUS will distribute in electronic form and via paper its planning documents.

Start Date:

End Date:

P4.2. MOBIUS will continue to receive input regarding services development from *ex officio* members on its Board, from the Missouri library community, and from other interested and qualified entities.

Start Date:

End Date:

Planning and Administrative Goal Statement 5 (P5): MOBIUS will examine the needs and opportunities for compact storage.

Planning and Administrative Objectives: P5

P5.1. MOBIUS will evaluate the need for compact storage, and will identify potential locations for and strategies for accessing materials in compact storage.

Start Date:

End Date:

P5.2. MOBIUS will present compact storage alternatives to the MOBIUS community for discussion and input regarding the need for, location of, and access to compact storage.

Start Date:

End Date:

Planning and Administrative Goal Statement 6 (P6): MOBIUS will develop and use a Service Level Agreement (SLA) to define levels of technical and services support for MOBIUS services to its members.

Planning and Administrative Objectives: P6

P6.1. A committee of MOBIUS members will review Service Level Agreements in place in similar organizations and circumstances; the committee will make recommendations regarding the contents of the MOBIUS Service Level Agreement.

Start Date:

End Date:

P6.2. MOBIUS will develop and distribute a draft SLA for comment from the MOBIUS community.

Start Date:

End Date:

P6.3. MOBIUS and its members will amend existing MOBIUS service agreements to add the SLA to those agreements.

Start Date:

End Date:

Planning and Administrative Goal Statement 7 (P7): MOBIUS will defer expansion of the MOBIUS membership until the organization has met its obligations to its current and committed members.

Planning and Administrative Objectives: P7

P7.1. MOBIUS will consider expansion of membership and new categories of membership when MOBIUS has achieved its primary service goals; completion of the original eleven Common Library Platform clusters and the services associated with the CLP.

Start Date:

End Date: