MOBIUS
Linking Missouri's Academic Libraries

Long-Range Plan
For
MOBIUS

Executive Summary

The MOBIUS organization provides library information services to Missouri academic libraries and, in less than three years, has succeeded in developing and implementing world-class library services and access features for Missouri's institutions of higher education.

With the support of a wide range of higher education organizations, including the Missouri Coordinating Board for Higher Education (MCBHE) and the Council on Public Higher Education (COPHE), MOBIUS developed a feasibility study and plan that garnered the financial support of the Missouri General Assembly. Using vendor-supplied and vendor-developed hardware and software products, MOBIUS quickly began implementing clusters of academic libraries. Now, approximately two-thirds of the two- and four-year colleges and universities libraries are in full operation on the Common Library Platform (CLP), the name used to describe the resource-sharing system that MOBIUS operates.

With two-thirds of the college and university libraries in Missouri on the CLP, MOBIUS still faces 12 to 18 months of implementation to bring up the remaining libraries. Following completion of its initial commitments, MOBIUS will begin implementing new and member-required features in the CLP.

The benefits of the CLP to library patrons, academic researchers, staff and the citizens of Missouri are many:

- Shared library materials, accessible via any Internet-connected computer.
- Borrowing and lending services that are automated and linked to the computer catalog, including support for Distance Learning.
- Delivery services, to ensure that materials are available in a timely manner.
- Access to electronic subscriptions.
- Cost effective operations, using a single, skilled organization to provide technical and support services, thus reducing the burden of effort for all MOBIUS participants.
- Leveraged use of other technology resources such as MOREnet.

Despite its successes, MOBIUS faces a variety of technology, services, and planning and administrative challenges. MOBIUS must continue to implement new clusters of participants, plan for technology futures in the CLP and among members, and develop cost-effective methods of communicating and receiving member input.

This Long-Range Plan includes Goals and Objectives in three separate Goal Areas:

- Technology
- Services
- Planning and Administration

Altogether, the Plan consists of 30 Objectives, more than two-thirds of them focusing on completion of existing commitments or recognizing and codifying MOBIUS current practice.

This Plan makes clear that MOBIUS is first and foremost a service organization. That is, it exists to meet the needs of its members, and thus carries the burden of meeting the commitments it has made to its members.

First and foremost of these commitments is to bring libraries into one of the Common Library Platform clusters so they can begin using CLP services. All these new members have notified their existing automated system providers that they are terminating their contracts in order to migrate to MOBIUS. Thus, MOBIUS must be able to bring these libraries into full CLP operation in a timely and effective manner.

In order to meet these commitments, it is critical to MOBIUS that it has the financial wherewithal to undertake and conclude complex and demanding tasks. In this final regard, the financial support of Missouri's government is critical.

Background to MOBIUS

The MOBIUS organization emerged from an effort to create a statewide Missouri academic library union catalog and resource-sharing system with world-class features. A major element of the planning process was the feasibility and cost study that the Council on Public Higher Education (COPHE, whose early vision was acutely on target), the Missouri Public Academic Library Administrators (MPALA), and the Missouri State Coordinating Board for Higher Education (MCBHE) supported. The study indicated that such a resource-sharing system was achievable.

The initial MOBIUS plan, which has not wavered, was to expand an existing automated library services and access system—MIRACL—already in operation involving two private universities and the University of Missouri. The plan anticipated the good outcome that coordinated technology for library services would have for higher education in Missouri, as well as the enormous benefits to the State of Missouri in general.

The MOBIUS project sought and received State funding for fiscal years 1999, 2000, and 2001. MOBIUS's operational strategy called for the Common Library Platform—the name used to describe the technology base for the system—to provide support for Missouri academic libraries. The project was designed to capitalize on and leverage existing and planned-for facilities such as the Missouri Research and Education Network (MOREnet), as well as pre-existing systems and staff.

In summary, the initial plan for MOBIUS was a primary example of collaboration between higher education, state agencies, and information technology providers. Together, their efforts yielded results that no single entity could legitimately expect to achieve acting alone.

The support provided by the Missouri General Assembly and the Governor's Office, by the partnership of member institutions, as well as the presidents of Missouri institutions of higher education, permitted the MOBIUS organization to begin a three-year project to apply the most modern library and information services technology to academic libraries in Missouri. While MOBIUS has developed rapidly, it faced a complex, multi-year project and at the time of this plan's development, still had much work left to accomplish. See the section "Current Status of MOBIUS" for a full discussion of work remaining.

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

- Access to member academic library's materials and catalog regardless of location.
- Direct and immediate borrowing and lending support among member libraries, 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 World Wide Web (WWW) connectivity.

- A common database of all member libraries' materials, permitting statistical and management reports to be applied on individual libraries, clusters of libraries, or on a statewide basis.
- Use of the existing MOREnet backbone for access and transport of data between MOBIUS's servers and individual campuses.
- Benefits to students, faculty, staff; publicly available to anyone on the Internet.

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. 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 Consortium 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 third year of MOBIUS's 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. MCO 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, including materials pick up anywhere in the state.

        - Remote access to MOBIUS services and licensed products, including proxy and remote access to licensed data bases[1]

    - 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 members to assess needs and expectations.

[1]MCO will be responsible for some proxy requirements, and individual campuses will share responsibility for proxy authentication for their students, faculty, and staff.

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 strong collaborative team of current MOBIUS institutions to guarantee a continued robust consortium.

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. Given this premise, MOBIUS will appoint a Task Force to carefully explore relationships with other types of libraries in Missouri as we have the ability and capability." See Planning and Administration Goal 7, Objectives P7.1 and P7.2.

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 Planning and Administration.

Each category includes a number of Goals, each of which has one or more Objectives. The Plan includes timelines for each objective, focusing on the period in which the work begins and concludes on the objective.

Note: This section of the Long-Range Plan includes calendar for each objective, showing the beginning, end, and duration of the work needed to accomplish that objective.

The following example shows a calendar for an objective that commences in the fourth quarter of 2001 (in the months of September through December 2001), and continues until the third quarter of 2003.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
	X							**X**			

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 implementation commitments to clusters that are in development or planned for completion.

This is the most important single factor in MOBIUS planning: continuing to meet commitments to existing and new MOBIUS participant clusters. Since work is underway on this objective, it shows no beginning date.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
			X								

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

MOBIUS has endorsed a standards-based approach to all of the server, workstation, and network systems it operates, and will continue to do so. This approach will permit MOBIUS and its members to grow and accommodate new developments. Since work is underway on this objective, it shows no beginning date.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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

MOBIUS has committed to use of a leading vendor-developed, vendor-supported integrated library system, which is upgraded at least annually, and MOBIUS will install all upgrades as soon as practical after their release. Since work is underway on this objective, it shows no beginning date.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

T1.4 MOBIUS will provide Remote Access to the MOBIUS services and licensed products on the Common Library Platform.

Remote access will permit accredited borrowers or other users, such as staff and faculty, to connect to and make use of the CLP and other MOBIUS services.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
				X							**X**

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 support licensing of electronic databases, while not replicating those services provided in a cost-effective manner by MOREnet or other providers.

As the range and value of electronic publishing and distribution grows, MOBIUS will aim to fill needs that are not being met in the Missouri academic community, with a particular intent to expand the overall range of services. Since work is underway on this objective, it shows no beginning date.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

T2.2 MOBIUS will develop and support other electronic resources including a mediated Scholar's Portal to the Internet.

MOBIUS already supports electronic information services. The Scholar's Portal will be an index and access mechanism that will include electronic materials, subscriptions, catalogs, and research services that are academically rigorous, have been evaluated by scholars, bibliographers, and reference and research experts, and include services contracted for by MOBIUS and its members, by other consortia, or by state agencies.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
			X		**X**						

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.

The training and support functions for MOBIUS members are among MOBIUS's greatest responsibilities. Since work is underway on this objective, it shows no beginning date.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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

In order for new MOBIUS members to participate in the CLP, their databases of books, patrons, and other data types must be incorporated into the CLP. This is a great responsibility, and is demanding, detailed, and highly technical work. Since work is underway on this objective, it shows no beginning date.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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

MOBIUS will keep its commitments to its members for support, including assurance of the best personnel, equipment, and facilities that MOBIUS can provide. Since work is underway on this objective, it shows no beginning date.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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

Services Objectives: S2

S2.1. MOBIUS will provide capacity through the CLP for Distance Learning services providers, and will investigate creating specialized services for DL courses offered through Missouri's Learners' Network.

This objective will tax MOBIUS's development staff, and cannot be undertaken without a thorough evaluation of the probable effort and discussion with the product vendor regarding feasibility and licensing issues. Nevertheless, it is MOBIUS's intent to remain synchronized with DL issues and support DL wherever possible.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
	X										**X**

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

Distance Learning puts an extra demand on delivery services, since DL courses are almost always accessed in settings remote from the materials that support academic research. Since MOBIUS supports delivery at this time, there is no start time shown for this objective.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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 daily Monday through Friday to pick up and deliver materials borrowed using the CLP.

The delivery services that MOBIUS provides will almost certainly expand as the number of participating libraries grows. Since MOBIUS provides delivery services at this time, no start date is shown.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

Services Goal Statement 4 (S4): MOBIUS will license electronic subscriptions and databases. (This is a Services expression of a Technology objective: See T2.2)

Services Objectives: S4

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

As noted, MOBIUS provides electronic subscriptions. No start date is show because this objective exists now.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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

This is an emerging issue for libraries and consortia, and no easy solution exists for controlling access since virtually every supplier has its own subscription and control requirements. Despite the potential difficulties, MOBIUS recognizes the very high value such services would provide, and also recognizes that this objective dovetails with Remote Access: See S4.3 following.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
				X							X

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

MOBIUS already supports unmediated remote access, and will develop or implement proxy products that are compatible with electronic subscription services.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
X											**X**

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.

MOBIUS has and will continue to make its processes open to the library, higher education, and academic communities, as well as state agencies and other interested parties.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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

All MOBIUS planning and services documents are available in several formats, and MOBIUS will continue to stress public access to its services and planning documents.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

Planning and Administrative

The Planning and Administrative matters section 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.

MOBIUS will continue the practice of involving member library representatives and the Executive Committee in annual planning processes, with the results widely disseminated. Since this procedure has been standard practice, no start date is shown.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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

When it is appropriate to sound out other libraries or agencies regarding MOBIUS plans, or when such plans may affect other libraries or agencies, MOBIUS may elect to involve non-members in its planning. Since this has been standard procedure since MOBIUS's inception, no start date is shown.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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 regularly 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.

This objective codifies and amplifies MOBIUS efforts to identify member capabilities and needs. This has been standard procedure since the initial feasibility study that predated MOBIUS.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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.

The effort of developing, delivering, receiving, and tabulating survey documents would become much easier using Web-based techniques. Such survey methods could automatically update member information databases, making them doubly attractive

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
		X									**X**

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.

Because MOBIUS relies on state funding to meets its obligations, and because its most basic development work remains incomplete, it is critical to the organization that it has the support of Missouri's legislature and executive agencies. Communicating with these bodies is a prerequisite to having their support. Because such communication has been part of MOBIUS efforts, no start date is shown.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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

This objective restates standard practice for MOBIUS.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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.

This objective restates MOBIUS standard practice.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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.

This objective states what has been standard practice since before MOBIUS's formation.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

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 if appropriate, will identify potential locations for and strategies for accessing materials in compact storage.

This objective identifies a new initiative. Compact storage helps reduce the need for critical and expensive floor and shelving space in libraries, and with automated access and rapid delivery, compact storage can be a cost effective alternative to library construction or expansion.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
						X					**X**

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.

Following the evaluation identified in P5.2 above, MOBIUS will present findings and alternatives to its membership regarding options for compact storage.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
								X			**X**

Planning and Administrative Goal Statement 6 (P6): MOBIUS will continue to 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. MOBIUS members will review Service Level Agreements from similar organizations will make recommendations regarding the contents of the MOBIUS Service Level Agreement.

MOBIUS members may address SLA issues at any time.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
X											**X**

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 when MOBIUS has achieved its initial service goals: completion of the original eleven Common Library Platform clusters and the services associated with the CLP.

While MOBIUS has received inquiries regarding affiliation from libraries that do not meet MOBIUS membership criteria, it has elected to defer any consideration until the organization has met its most basic commitments. These include completing cluster

implementation, conversion of data from member libraries' older systems, training, and full service implementation to all members.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
											X

P7.2. MOBIUS will consider new categories of membership after it has achieved its initial service goals.

As with expansion of membership, completion of MOBIUS's commitments comes before developing other categories of membership.

2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
				X							**X**

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Appendix A: Consolidated Timeline of MOBIUS Activities Related to Long-Range Planning

This table replicates and consolidates the individual calendars from the Technology, Services, and Planning and Administration sections of the Long-Range Plan.

One key finding revealed in this table is how little of MOBIUS' activity involves start-up tasks, services, or innovation. Only nine of the thirty objectives involve activity not currently part of MOBIUS's responsibility.

No.	Per. > Obj. ∨	2001 Q3	2001 Q4	***2002 Q1***	2002 Q2	2002 Q3	2002 Q4	***2003 Q1***	2003 Q2	2003 Q3	2003 Q4	***2004 Q1***	2004 Q2
1.	T1.1				X								
2.	T1.2												X
3.	T1.3												**X**
4.	T1.4				**X**								**X**
5.	T2.1												**X**
6.	T2.2				**X**		**X**						
7.	S1.1												X
8.	S1.2												X
9.	S1.3												**X**
10.	S2.1		**X**										**X**
11.	S2.2												
12.	S3.1												X
13.	S4.1												**X**
14.	S4.2				**X**								**X**
15.	S4.3	**X**											**X**
16.	S5.1												**X**
17.	S5.2												**X**
18.	P1.1												**X**
19.	P1.2												**X**
20.	P2.1												**X**
21.	P2.2			**X**									**X**
22.	P3.1												**X**
23.	P3.2												**X**
24.	P4.1												**X**
25.	P4.2												**X**
26.	P5.1							**X**		**X**			
27.	P5.2									**X**			**X**
28.	P6.1												**X**
29.	P7.1												**X**
30.	P7.2												**X**