MOBIUS Cooperative Collection Management Task Force
Preliminary Report
July 2014

Goal of the MOBIUS CCM Initiative:

To explore and engage in cooperative, collaborative, and collective activities and strategies that advance the collection management goals of MOBIUS Member organizations, as well as those of MOBIUS as a whole, in order to provide more information to MOBIUS users in a timelier, more usable, and more efficient manner.

Charge to the MOBIUS CCM Task Force:

Explore and assess various CCM opportunities and issues -- current, near-term, and long-term. Raise awareness about, evaluate, and make recommendations regarding these CCM opportunities and issues as they pertain to MOBIUS, MOBIUS Members, and the user population.

Deliverable:

July 25, 2014: Submit a preliminary report with recommendations to the MOBIUS Board and to the MOBIUS Membership about productive, efficient ways in which MOBIUS can expand and accelerate its CCM activities.

Members of the MOBIUS CCM Task Force:

- Jennifer Peters (Rockhurst U)
- Genie McKee (Maryville U)
- Laura Rein (Webster U)
- Ann Riley (U of Missouri-Columbia)
- Jeff Trzeciak (Washington U)
- Tom Peters (Missouri State U) (Chair)
- Donna Bacon (MCO) (ex officio)

Key Opportunities, with Recommendations:

- **Collaborative Management of Few/Last Copies of Printed Materials**:
    - Recommendation: We strongly recommend that all MOBIUS Member institutions participate in the existing MOBIUS collaborative last-copy management initiative. Review and revise the existing July 2008 policy, with revisions made in June 2009. Pursue consortium-wide access to Weeding-Helper or other software to

reduce the amount of staff time involved.

- Context: At the April 4, 2014 meeting of the MOBIUS Board, strong interest was expressed in last-copy identification and, when appropriate, retention practices. One issue about full implementation of this guideline is the staff time involved. Weeding-Helper is a software tool that could help reduce time and labor costs. Rockhurst University has been experimenting with Weeding-Helper (https://github.com/kenirwin/Weeding-Helper).

- **Collaborative Physical Storage of Printed Monographs, Journal Runs, and Series:**

  - Recommendation: MOBIUS should pursue a formal shared storage agreement for printed materials with the University of Missouri-Columbia, covering different types of ingest (true last copies, duplicate copies, specific subject areas, collections, etc.).

  - Context: The University of Missouri-Columbia's above-ground compact storage facility on Lemone Industrial Boulevard in Columbia has growth potential, including possibly the addition of another pod. Ownership over time and fee structures for the storage of various statuses of materials by MOBIUS as a consortium or individual MOBIUS Members will need to be articulated. If this initiative comes to fruition, this may enhance the feasibility and attractiveness of a MOBIUS scan-on-demand initiative (see below).

- **Consortial DDA (Demand Driven Acquisition) and eBook Sharing:**

  - Recommendation: MOBIUS should actively investigate and plan a consortial DDA initiative, focusing on sharable ebooks, while continuing to examine the initiatives of other consortia in this area.

  - Context: Speculative collection building by individual MOBIUS Members is under duress in many ways. ORBIS-Cascade currently is spending approximately $1 million annually on ebooks selected via DDA. Some MOBIUS Members already have active individual DDA programs.

- **Regional Institutional/Consortial Repository**:

  - Recommendation: A MOBIUS committee or task force should continue to investigate the advantages and feasibility of a consortial IR.

  - Context: The types and sheer quantity of IR-worthy digital materials (ETDs, large locally-created datasets, open access content, digital learning objects, etc.) continues to expand rapidly. While there are discipline-based repositories for some of these types of digital materials, as well as publisher-based, an

institutional or consortially-based repository may be more trusted and sustainable.

- **Consortial eResource Agreements:**
    - Recommendation: Continue to be very active in this area.
    - Context: MOBIUS currently has 69 contracts. Nationally and internationally, we seem to be in an era where consortial membership is shifting, perhaps with an increasing number of mergers and acquisitions. Contracts and contract renewals are very labor-intensive. We need to find a way to streamline and normalize the process.
- **Usage Assessment:**
    - Recommendation: Expand and refine consortial collection and analysis of usage data about the various collections held and maintained across the consortium.
    - Context: A consortial usage assessment effort could lead to better sharing of expertise and insights, standardization of definitions and reports, etc. This initiative would also highlight the value of MOBIUS to the Members, as well as assist MOBIUS Members in demonstrating value to their parent organizations, governing boards, and stakeholders, in an era where output and outcomes assessment are emphasized.
- **Consortial Access to College-Level eTextbooks:**
    - Recommendation: A MOBIUS committee or task force should actively explore options and costs.
    - Context: Pursuit of this type of CCM activity was strongly encouraged by several attendees of the CCM session at the MOBIUS Annual Conference in June 2014.
- **Interconsortial Agreements and Activities:**
    - Recommendation: We recommend that MOBIUS pursue additional interconsortial agreements, when mutually beneficial.
    - Context: Discussions, trials, and deployments of interconsortial agreements and programs seem to be on the rise. ICOLC meetings may be a good venue for discussing and pursuing agreements and activities with other consortia.
- **Scan on Demand Services:**

    - Recommendation: Not recommended for serious consideration at this time.

    - Context: The members of this task force were unable to discern strong current and near-term demand for scan on demand services among MOBIUS Members, not could we discern strong consortial advantages.

- **Print on Demand Services:**

    - Recommendation: Not recommended for serious consideration at this time.

    - Context: Concerns were expressed about the high roll-out costs of current POD technologies, the finickiness of the technology, and perhaps low demand across the consortium.

- **Collaborative Streaming Media Capacity and Curation**:

    - Recommendation: Not recommended for serious consideration and investigation at this time.

    - Context: The members of the task force have concerns about the long-term viability of a consortial solution to this need. Third party streaming media services seem to be advancing swiftly.

General Issues Regarding MOBIUS CCM Activities:

- **The Position and Role of CCM Within MOBIUS**: Historically, the strengths and areas of emphasis for the MOBIUS consortium have been a shared union catalog and resource sharing via courier service. As the MOBIUS consortium continues to expand (into multiple states, as well into additional areas of endeavor), the Board and the Members should continue to explore and discuss how cooperative collection management of both print and digital materials fits into the overall mission and strategic directions of the consortium.

- **The Trust Factor:** How much do the Member Institutions trust MOBIUS regarding cooperative collection management issues, which may include MOBIUS ownership of library materials? CCM often entails long-term commitments and the assumption of shared responsibilities. The vicissitudes of funding (both at the individual Member and the consortial level), staffing, technology, and other factors can put a strain on any CCM initiative.