Summary, MOBIUS Member Assessment
Data Capture
Revised March 6, 2013; Revised Jan 27, 2015

Data for the MOBIUS member assessments is captured on (or as soon as possible after) the last business day of the fiscal year (typically June 30). The captured data is used for the member assessments two fiscal years hence (e.g., the data captured on June 30, 2014 [FY13/14] will be used for the member assessments for FY15/16). Student FTE figures are taken from the Fall of the fiscal year two years prior to the assessment year (e.g. Fall 2013 FTE data is used for the FY15/16 Assessments).

Data for the MOBIUS member assessments is captured by MOBIUS Office staff. In the event that MOBIUS is unable to collect the assessment data on a given local system, MOBIUS staff will contact the system's site coordinator and request that the necessary data be provided to MOBIUS as soon as possible.[1]

MOBIUS – Member Fees (MemFees (FTE))

Courier

Courier costs to MOBIUS members are governed by the current contract. The total courier cost is divided evenly among MOBIUS member libraries[2].

Membership

Membership fees are based on MOBIUS administrative expenses, detailed in the **BASIC MEMBERSHIP** columns of the **MOBIUS – Expenses by Category (Categories)** spreadsheet (see below).

Union Catalog

Union Catalog fees are determined in the **MOBIUS – Union Catalog Cost Share (UnionCat)** spreadsheet (below).

Local Catalog

Local Catalog fees are determined in the **MOBIUS – Local (Cluster) Catalog Cost Share for Server Support (Local-Srvr Support)** and **MOBIUS – Local (Cluster) Catalog Cost Share for expenses except Server Support (Local-w.o Srvr Support)** spreadsheets (below).

Loans

The total number of institutional lends for the fiscal year two years prior to the assessment year (e.g., FY13/14 Lends for the FY15/16 Assessments). The number of lends consists of the total of the *Intra-Cluster Lending* and *MOBIUS Central Catalog Lending* figures, taken from the Lending & Borrowing

[1] Note: When referring to the different spreadsheet in the MOBIUS Assessments, this document uses the convention of the name of the spreadsheet, with the name of the tab following in parentheses, all in bold typeface, e.g. **MOBIUS – Union Catalog Cost Share (UnionCat)**.
[2] As of FY13/14, Camden County, Christian County, Missouri River Regional, Springfield-Greene County, and Tulsa City-County Libraries do not pay for courier service through MOBIUS.

Statistics Report, posted to the MOBIUS Web site at http://mobiusconsortium.org/view-lending-borrowing-statistics.

Credit

Each institutional lend transaction earns a credit of $1.00 per lend. This figure is calculated by multiplying the number of Loans by $1.00.

Borrows

The total number of institutional borrows for the fiscal year two years prior to the assessment year (e.g., FY13/14 Lends for the FY15/16 Assessments). The number of borrows consists of the total of the *Intra-Cluster Borrowing* and *MOBIUS Central Catalog Borrowing* figures, taken from the Lending & Borrowing Statistics Report, posted to the MOBIUS Web site at http://mobiusconsortium.org/view-lending-borrowing-statistics.

Charge

Each institutional borrow transaction incurs a per borrow charge. The aim of the Lending credits and Borrowing charges is that their totals will offset one another. The amount of the per borrow charge for each fiscal year is determined by the MOBIUS Board of Directors[3]. This figure is calculated by multiplying the number of Borrows by the charge identified by the Board.

Total

The Assessment for the fiscal year, calculated by total the amounts of the Courier, Membership, Union Catalog, and Local Catalog fees and applying the Lending Credit and Borrowing Charge amount.

Total (previous year)

The Assessment for the previous fiscal year.

Difference

The dollar amount of increase or decrease in assessment from the previous year.

% Change

The percentage of increase or decrease in assessment from the previous year.

[3] For the FY14/15 Assessments, the per borrow change is identified as $1.15669.

MOBIUS – Local (Cluster) Catalog Cost Shares: Server Support (Local-Srvr Support) & expenses except Server Support (Local-w.o Srvr Support)

The MOBIUS Office manages eleven local ILS (Millennium or Sierra) systems (a.k.a. "Clusters"), each shared by 3-10 MOBIUS members. MOBIUS members that belong to a Cluster pay for a share of the expenses in maintaining the Cluster systems.[4]

The MOBIUS Assessment includes two spreadsheets, one for non-server expenses (**MOBIUS – Local (Cluster) Catalog Cost Share for expenses without Server Support (Local-w.o Srvr Support)**) in which all members pay a portion of the total, and one for server-related expenses (**MOBIUS – Local (Cluster) Catalog Cost Share for Server Support (Local-Srvr Support)**), in which all members except the University of Missouri members pay a portion of the total. The University of Missouri maintains its server separately from MOBIUS, and thus does not pay a portion of local system server costs.

Algorithm

The total number of item records (excluding withdrawn and discarded items) is determined for each MOBIUS member that is in a Cluster system. From the member totals, a grand total of all item records in all MOBIUS Clusters is determined. Each member's percentage of the total is calculated and that percentage is then applied to *half* of the total amount of the Local Catalog expenses as given in the **MOBIUS Expenses by Category (Categories)** spreadsheet (below).

The total student FTE for each MOBIUS member that is in a Cluster system is taken from the Missouri DHE Report for two fiscal years prior to the assessment year (i.e., Fall 2013 (FY13/14) for the FY15/16 Assessments). MOBIUS staff will solicit the total student FTE directly from those institutions not listed in the Missouri DHE Report.[5] From the member totals, a grand total FTE is determined. Each member's percentage of the total is calculated and that percentage is then applied to *half* of the total amount of the Local Catalog expenses as given in the **MOBIUS Expenses by Category (Categories)** spreadsheet (below).

The **MOBIUS – Local (Cluster) Catalog Cost Share for Server Support (Local-Srvr Support)** worksheet uses the Cluster Server Support figure given in the **MOBIUS Expenses by Category (Categories)**

[4] The MOBIUS members that do not pay a share of Local Catalog costs are: Camden County Library, Christian County Library, Missouri River Regional Library, Springfield-Greene County Library, St. Louis University, Tulsa City-County Library, and Washington University.

[5] Seventeen as of FY15/16: A.T. Still University, Baptist Bible College, Conception Abbey & Seminary College, Concordia Seminary, Covenant Theological Seminary, Evangel University, Goldfarb School of Nursing, Kansas City Art Institute, Kenrick-Glennon Theological Seminary, Logan University, Midwestern Baptist Theological Seminary, Missouri Botanical Garden, Missouri History Museum, Missouri State Library, St. Louis Art Museum, St. Louis College of Pharmacy, Saint Paul School of Theology.

spreadsheet. The University of Missouri members do not pay for Server Support; their item record and FTE entries are reported as "0" in this worksheet.

The **MOBIUS – Local (Cluster) Catalog Cost Share for expenses except Server Support (Local-w.o Srvr Support)** worksheet uses the total amount for Local Catalog expenses, minus the amount for Cluster Server Support, as given in the **MOBIUS Expenses by Category (Categories)** spreadsheet.

Items

Number of item records held by each institution, excluding items with "withdrawn" or "discarded" location codes.

Data Capture (for each Cluster system)

Step 1 – Create & Export Item Field Statistics (Location) Report

1. Log into Sierra
2. Select the Statistics function
3. Select the Query, MOBIUS Item Field Statistics Report
    a. Range: all item records
    b. Report On: Item
    c. Query Type: Field Statistics
    d. Fastest Accumulation: True
    e. Split multi: True
4. Click Run Saved Query
5. When Query has finished running, click on Results Files
6. Select the Results File, MOBIUS Item Field Statistics Report
7. Click View Report
8. Under Select Report, click Location
9. Click Export
10. Click Open in Excel
11. Save the Excel Report
12. Exit Sierra

Step 2 – Analyze the Report

1. Concentrate on the 1st three columns (Code, Meaning, Record Count) of the report

	Code	Meaning	Record Count
6	Code	Meaning	Record Count
7	cfaii	St Charles Foreign Lang.	15
8	claii	St Charles AV	4307
9	clani	St Charles AV Reserve	23
10	claxi	St Charles AV Reserve	805
11	clb	St Charles Circulating	3
12	clcci	St Charles CC Cabinet	38
13	cleii	St Charles Elec. Resource	35
14	cleni	St Charles Elec. Resource	27025
15	clgai	St Charles Accompanying AV	457

2. Divide the report into separate sections for each MOBIUS member, cutting and pasting lines, as necessary
3. Using the "Meaning" column, Identify and highlight Withdraw & Discard Locations

52	ecsli	ECC Leisure Reading	205
53	ecsmi	ECC Leisure Reading	289
54	ecssi	ECC Rare	7
55	ecuii	ECC Unscoped item	455
56	ecw	ECC Withdrawn bib	1
57	ecwdi	ECC Unscoped discard item	3
58	errrr	ECC Rolla	149

4. Total the Record Counts for each MOBIUS member, excluding the Withdraw & Discard Locations

54	ecssi	ECC Rare	7	
55	ecuii	ECC Unscoped item	455	
56	ecw	ECC Withdrawn bib	1	
57	ecwdi	ECC Unscoped discard item	3	
58	errrr	ECC Rolla	149	=sum(C32:C55,C58)
59				

% total items

The MOBIUS member's number of items divided by the total number of items, representing the member's percentage of the total.

50% Share

The MOBIUS member's share of half the Local Catalog costs, determined by multiplying the percentage of total items by 50% of the cost as given in the **MOBIUS – Expenses by Category (Categories)** spreadsheet (below). See description of Server costs vs. non-server costs above.

Student FTE

Number of full time students/student equivalents reported to the Missouri DHE (or the MOBIUS office) by the MOBIUS member.

% total FTE

The MOBIUS member's FTE divided by the total FTE, representing the member's percentage of the total.

50% Share

The MOBIUS member's share of half the Local Catalog costs, determined by multiplying the percentage of total FTE by 50% of the cost as given in the **MOBIUS – Expenses by Category (Categories)** spreadsheet (below). See description of Server costs vs. non-server costs above.

MOBIUS – Union Catalog Cost Share (UnionCat)

Algorithm

The total number of items that circulate via the MOBIUS union catalog is determined for each MOBIUS member. From the member totals, a grand total of all MOBIUS-circulating item records is determined. Each member's percentage of the total is calculated and that percentage is then applied to the total amount of the Union Catalog expenses as given in the **MOBIUS Expenses by Category (Categories)** spreadsheet (below).

Requestable Items

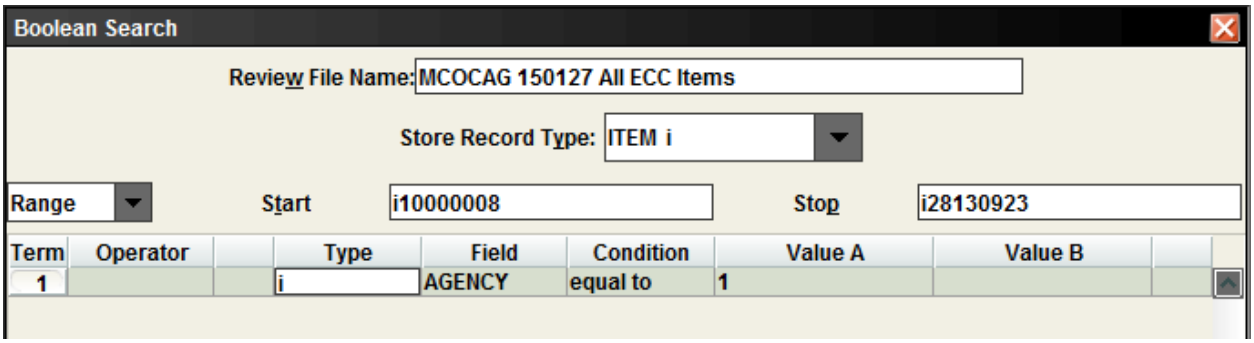
Number of MOBIUS-circulating item records that are contributed to the MOBIUS union catalog.

Data Capture – Local Systems[6]

The number of item records that circulate via MOBIUS for each MOBIUS member is determined through the use of the Sierra Create Lists and Statistics functions.

Step 1 – Create a List of Item Records Belonging to a Member

1. Login into Sierra
2. Select the Create Lists function
3. Select an empty, large capacity Review File
4. Click Search Records
5. Enter search parameter(s) for Agency codes belonging to one MOBIUS member

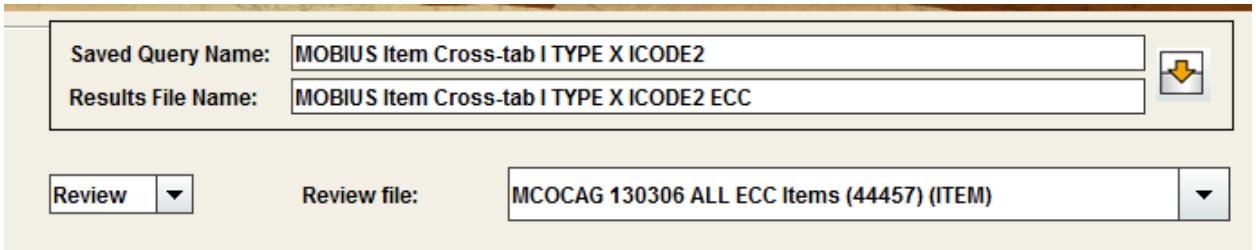


6. Click Search

Step 2 – Create & Export an Item Cross-Tab (ICODE2 X I TYPE) Record Count Report

1. Select the Statistics function
2. Click on Saved Queries
3. Select MOBIUS Item Cross-tab I TYPE X ICODE2 & Click Edit Query
    - Report On: Item
    - Query Type: Cross Tab
    - Fastest accumulation: True
    - Vertical: I TYPE
    - Horizontal: ICODE2
4. Change the source data to the Review File created in Step 1
5. Add the name (or abbreviation) of the member to the Results File Name

[6] MOBIUS staff gather this data directly from the 11 local "cluster" systems. MOBIUS staff requests this data – and provides the methodology for retrieving it – from Camden County Library, Christian County Library, Missouri River Regional Library, Springfield-Greene County Library, St. Louis University, Tulsa City-County Library, and Washington University.



6. Click Run the Query!
7. When the query has finished running, select the results file, MOBIUS Item Cross-tab I TYPE X ICODE2 [member name], & click View Report
8. Click on Record Count
9. Click on Export
10. Click on Open in Excel
11. Save the Excel Report

Step 3 – Analyze the Report

1. Identify and highlight the record count figures for MOBIUS-contributing ICODE2 values and MOBIUS-circulating I TYPE values[7]
2. Total the highlighted figures

[7]

Cluster or standalone	Contributing ICODE2	Circulating I TYPE
Archway	-, l, n	0, 99
Arthur, Bridges	-, l, n, q	0
COOL	m	20-21, 40, 122, 159-161, 164, 170-171, 175-176, 183-184, 191-192
Explore	-	0, 15, 16
Galahad, Kansas City, LANCE, Quest, SWAN, Towers	-, l, n	0
MERLIN	-, q	0, 150, 159
MRRL	-	0, 100
SLU	-, r	0, 150
Washington Univ.	-, n, o, r, u, x	1, 104

% Total Items

The MOBIUS member's circulating MOBIUS items divided by the total of all circulating items, representing the member's percentage of the total.

Share

The MOBIUS member's share of the total Union Catalog costs, determined by multiplying the % Total Items by the total Union Catalog cost as given in the **MOBIUS – Expenses by Category (Categories)** spreadsheet (below).

MOBIUS – Expenses by Category (Categories)

The fees for Basic Membership, Union Catalog, and Local Catalog are based on the MOBIUS budget for the stated fiscal year. MOBIUS costs – excluding Courier – are allocated among three categories corresponding to the three columns of the main spreadsheet.

Costs related to MOBIUS personnel – including salary/benefits, office supplies, staff development, and business travel – are allocated among the three categories based on the number of staff FTE allocated to each area. Expense amounts per FTE are based on an average cost per MOBIUS staff member (11 for FY15/16).

Costs related to server support, authority control, and III maintenance are allocated on an actual basis between Union Catalog and Local Catalog costs.

Basic Membership

The Basic Membership column includes 3 FTE of staff-related expenses, and all expenses not related to the Union or Local catalogs. The total is divided equally among the current member libraries (70 for FY15/16).

Union Catalog

The Union Catalog column includes 1 FTE of staff related expenses and actual costs for server support, authority control, and III maintenance.

The Union Catalog total is the figure against which the percentages determined in the **MOBIUS – Union Catalog Cost Share (UnionCat)** spreadsheet (above) are applied to determine the per institution Union Catalog fee.

Local Catalogs

The Local Catalogs column includes 7 FTE of staff related expenses and actual costs for server support, authority control, and III maintenance.

The Cluster Server Support amount is the figure against which the percentages determined in the **MOBIUS – Local (Cluster) Catalog Cost Share for Server Support (Local-Srvr Support)** spreadsheet (above) are applied to determine the per institution cost of Cluster Server support.

The Local Catalog total, minus the Cluster Server Support amount, is the figure against which the percentages determined in the **MOBIUS – Local (Cluster) Catalog Cost Share for expenses except Server Support (Local-w.o Srvr Support)** spreadsheet (above) are applied to determine the per institution cost of non-server Cluster expenses.