The MOBIUS Consortium came to life on July 1, 1998, and since then, through the vision and courage of the presidents and librarians of its member institutions and through the initiative and hard work of member and MOBIUS office staff, it has truly transformed library services for Missouri higher education students and faculty. Before July 1998, the libraries in Missouri’s colleges and universities functioned as autonomous entities, and if a student at Southwest Missouri State University needed a book that was held in Missouri only at Saint Louis University, she was facing forms, red tape, and weeks of waiting, not to mention very possibly an interlibrary loan fee. Since July 1998 that student faces virtually no barriers to obtaining the book that she needs, being able to bring it into her possession with a few clicks in her web browser and, one or two days later, a trip to her home library to pick the book up.

On the one hand, this transition from what was to what is seems to have come about with remarkable ease and lack of drama. On the other hand, a staggering amount of work has been accomplished in a very short time—and now that I think about it, no doubt it is this work, the dedicated efforts of hundreds of librarians throughout the state, that has made a hard-won success seem effortless.

Elsewhere in this, MOBIUS’ first annual report, you will find tables and charts that quantify the work that has been done. I believe you will see what has been accomplished is tremendous; now the challenge is to focus on what needs to happen to insure that this work has not been for naught.

George Rickerson, Executive Director

**Goals of the Consortium**

- **Economically sustainable**, increased student and faculty access to and use of library—provided information to support and improve instruction and research ... as a consortium.
- **Higher quality service**, support and training delivered at a lower cost than institutions could achieve individually.
- **Effective library services** for distance learners delivered at a sustainable cost.
The MOBIUS Consortium organized itself in 1998 to carry out CBHE policy recommendations for improving library services in Missouri’s colleges and universities through collaborative programs. The founding documents of MOBIUS identify two programs through which the policy recommendations of the CBHE would be realized: the Common Library Platform, which uses automation to enable effective library resource sharing among member institutions; and consortial licensing of electronic information resources, which uses the economic leverage of the group to provide increased access at affordable cost to these expensive but essential information products.

As a result of the recommendation of Governor Mel Carnahan and the active and able support of Dr. Kala Stroup, Missouri Commissioner of Higher Education, the Missouri General Assembly in 1998 committed to a funding plan for the Common Library Platform (CLP) project and appropriated the first of what would be a total of $10.2 million for the capital costs of that project. The funding plan is a partnership between the consortium and the state of Missouri that provides that the state will fund the capital costs (hardware, software, implementation costs) of the CLP and that the state and the members of the consortium will share equally the ongoing operational costs of the CLP.
The initial implementation of the CLP is in its final stages. Eight of 11 clusters are operational, and all 49 charter members will be online by July 2002. The CLP project is exactly on schedule and on budget, and when it is complete next summer it will serve more than 98% of the higher education students in Missouri.

MOBIUS is a membership organization. It has two potential sources of funding to cover operational expenses: its members, and the state of Missouri. With respect to the CLP, which is in place and which entails expenses that cannot be deferred or eliminated, to the extent that the state does not provide its share of the operational funding, the members must make up the difference. In FY02 this means a special assessment on the members of nearly $200,000. If we are not successful in securing increased state support
Through June 2001 the state has appropriated $10.2 million in one-time funds for MOBIUS; during the same period the members have provided a total of $1.5 million in dues and operational assessments. For FY02 the state appropriated $649,539, less than half of its share of the CLP operational costs, while the members will pay in a little over $1.2 million.

Some of the key indicators speak loudly of this potential just based on the 3+ years of MOBIUS’ life. Nearly 70% of the titles in the MOBIUS central catalog are held by one and only one MOBIUS institution. This very important statistic tells us that by working together in a project like the CLP we can significantly expand the library resources available to our students and faculty at a very reasonable cost. Moreover, taking this step has the result of increasing the use of the collections in which we have invested so much.

In the three years of MOBIUS’ life, the number of institutions online has quadrupled, the number of volumes online has doubled, and the inter-institutional borrowing of library materials has increased by a factor of 24. Over the next five years all of these indicators will continue to increase, but at the same time we project that the MOBIUS budget will essentially be flat.

An additional factor that is hard to put in graphical form is that, by working together in this collaborative project, every MOBIUS member institution—large and small—is receiving much more for its library automation dollar than when it was operating its own stand-alone library system. Every service—help desk, training, consulting support—is being provided at a higher level of quality than the institution could achieve on its own.
Dear Mobius,

My name is Greg Brennecka and I am a student at Columbia College in Columbia, Missouri. Even though I officially will receive my chemistry major with a minor in environmental studies from Columbia College, I am earning a second major in geology at the neighboring University of Missouri. I wanted to take a minute to personally thank you for all your help and support with my schooling by making it easier for students like me to find all the right literary materials in one convenient location.

I am very involved in student government, soccer and carrying 18 hours. With all of these responsibilities and time commitments, I often find myself running into procrastination problems with important term papers.

Last year, I had a fifteen-page case study on the elemental analysis of ancient 11th century glass beads for my Mizzou geology class. Since it was the end of the semester, I had several tests and projects piling up on me, not to mention the conference soccer tournament. I had to make efficient use of every minute of the day. I figured my best bet in finding the books I needed for my paper would be at the University’s library.

After being completely overwhelmed and finding only half of the books on my list, I gave up. That’s when the librarian told me about Mobius. Needless to say, Mobius was a lifesaver! Using the college’s library computer, I requested library materials from St. Louis University, Drury College, Washington University, Truman State University and even those lost books from the University of Missouri-Columbia. The whole, painless process took me only half an hour. Two short days later, I was cranking out my paper.

Now, whenever I have a paper due or need any type of library materials, I simply walk over to the library first thing. With Mobius’ help, I am able to use many more sources for information and save hours of time. Thank you so much!

Sincerely,
Greg Brennecka
Naturally MOBIUS members have not received notice of the special assessments with enthusiasm, and some ask why all of the relief has to come in terms of revenue. “Why not cut costs?” some ask. Options are very limited on the cost side. Out of a budget of $4.0 million, all but $1.0 million are fixed costs. The largest cost reduction possible that permits the organization to continue to function is about $100,000. A cut of this magnitude will degrade service and support from the MOBIUS Consortium Office without doing much to alleviate the funding shortfall.

Neither is dismantling the CLP altogether a viable option. It is very difficult to estimate precisely the costs of such a drastic step, but conservatively each member would experience costs of between $50,000 and $1.0 million, depending on the size and complexity of that member, with the depressing result that we would restore the state of library services to what they were before MOBIUS came along. It would be cheaper, not to mention more useful, for members to spend that money on keeping MOBIUS going.

During this time of uncertainty regarding MOBIUS funding, it is essential that we keep our eye on the ball, which is the tremendous potential that MOBIUS has to improve library services to students and faculty throughout Missouri at a very affordable and controllable cost.

MOBIUS gives us economic leverage: lowest unit prices, controlled costs and increased economic bargaining power. MOBIUS gives us information access leverage: much more access to many more information resources. MOBIUS gives us operational leverage: maximized cost effectiveness of computer investment, customized access to group needs; and preparedness for new developments in library technology. In MOBIUS, each member institution will spend less on library automation and get significantly more. Since these funds will be spent anyway, MOBIUS is a bargain that we cannot afford to ignore.
Records Loaded in FY01
Total—15,190,276

Archway 1,384,185
Arthur 1,179,381
Bridges 1,286,082
LANCE 2,559,181
MERLIN 4,737,263
SWAN 3,038,304
WIL0 1,005,880

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<td>Member Revenue</td>
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MOBIUS Key Indicators
1999=100

Volumes Borrowed
Institutions Online
Volumes Online
State Funding
Implementation and Support Services

One of the more significant value-added services provided by MOBIUS is the step by step CLP implementation assistance. This guidance is not available to institutions by the vendor if the software had to be purchased individually. The vendor does not offer this guidance for individually purchased systems. Robin Kespohl and Jim Dutton work directly with members of the clusters as they prepare to implement the CLP. Their work permits a seamless integration of the clusters.

Because MOBIUS has allowed for many independent decisions by the clusters, a variety of choices have to be made before loading the data. Therefore, consensus building among the member institutions of each cluster is a major focus of this department. As you can imagine, this is sometimes difficult given the disparity among the colleges and how they manage, index and administer their own library services.

Responsibility for profiling, testing, quality control, catalog workflow, cluster policies and circulation guidelines are only some of the areas handled by this team. They work closely with the each cluster for at least 27 weeks to adequately and accurately prepare each institution for the magical moment of “Go Live.”

Training Services

Training is one of the benefits of MOBIUS membership, and ongoing training was part of the MOBIUS CLP plan from the beginning. For libraries implementing a new automation system, dealing with software updates, or handling staff turnover, training is essential. The cost to each institution would be a burden if they were responsible for their own training.

For libraries in the implementation phase, MCO facilitates training from the system vendor, Innovative Interfaces, Inc., as well as provides custom training for the shared CLP environment. This year MCO-developed training accounted for more than half the 49 total training events. Implementation is the most intensive phase of the project with key staff members receiving up to fifteen days of training.

In addition to training from Innovative Interfaces, Inc. or training...
developed at MOBIUS, MCO also coordinates and cosponsors training. This year in conjunction with the MOBIUS Annual Conference, we sponsored basic cataloging training from the Missouri Library Network Corporation.

In year 2000-2001 MCO held 49 training workshops (74 days) serving more than 500 staff from member libraries. Of these workshops, 40 were devoted to implementation and nine were for clusters already implemented.

**Operations**

The Operations group is responsible for the maintenance of all CLP systems, making sure that each system (hardware and software) is configured for optimal performance, and for providing support to CLP library staff members with a Help Desk that uses an automated call-tracking system to log and manage all incoming requests for help, training, etc.

CLP system performance is maintained at peak levels by Gary L. Harris, Assistant Director-Operations, and his six member staff: Lynne Edgar, Christopher Gould, Qhyrrae Michaelieu, Janine Orrison, Mary Catherine Stubbs, and Allen Verbrugge.

The operations team performs several routine maintenance tasks on a daily basis for each CLP system, including eight INNOPAC computers serving 38 institutions. In addition, the operations team has responsibility for scheduling and installing major new software releases, implementing new products, monitoring more than 25 e-mail discussion lists, maintaining statistical data and staffing the Help Desk between the hours of 7 a.m. and 6 p.m. everyday except weekends and holidays. Help Desk staff are available 24 hours a day in the case of emergencies. During the fiscal year beginning July 1, 2000 and ending June 30, 2001, the Help Desk staff loaded 15.2 million database records into CLP systems and opened over 2,000 new calls, 1,938 of these were successfully resolved and closed during the same period.

Much of what happens in Operations takes place behind the scenes, including copying out and sending bibliographic records to various vendors for authority control work and record enrichment, reloading those records, loading patron records, and many other activities that provide value-added service to the participating libraries by relieving them of these responsibilities.
At a time when colleges and universities are in fierce competition with each other for students, MOBIUS is an important example of cooperation among these same institutions. With the cost advantage of purchasing through a large consortium, MOBIUS is providing the first electronic databases to MOBIUS members. MOBIUS purchased two history databases, *Historical Abstracts* and *America: History and Life*. Faculty, staff and students at MOBIUS member institutions are able to access these resources from any personal computer in any location with access to the Internet.

Total funding for this project comes from the 54 colleges and universities in Missouri that make up the MOBIUS consortium. Significant savings for these academic libraries are possible through the purchase by the consortium compared to the purchase by each individual library. In addition to the cost savings, there will be 24 hour unlimited access for all students, faculty and staff. The total number of students (full-time equivalents) having access is in excess of 200,000.

### Electronic Resources

Fontbonne College held a celebration of their new MOBIUS library system on August 30.
Chair
Sarah Cron
Southeast Missouri State University

Member at Large
John P. Young
William Jewell College

Chair-Elect
Valerie Darst
Moberly Area Community College

Member at Large
Steve Stooan
Drury College

Secretary
Carol Curtis
Ozarks Technical Community College

MOREnet Representative
Bill Mitchell
Executive Director

Treasurer
Julia Schneider
Missouri Western State College

Missouri CBHE Representative
Andy White

Past Chair
Shirley Baker
Washington University

Executive Committee Advisor
Sara Parker
Missouri State Library

Member at Large
Joan Clarke
St. Charles County Community College

Executive Director
George Rickerson

Member At Large
Karen Horny
Southwest Missouri State University
Chair
Valerie Darst
Moberly Area Community College

Chair-Elect
Laura Rein
Eden-Webster Library

Secretary
Carol Curtis
Ozarks Technical Community College

Treasurer
Elizabeth Wilson
Lincoln University

Past Chair
Sarah Cron
Southeast Missouri State University

Member at Large
Joan Clarke
St. Charles County Community College

Member at Large
Jean Eisenman
University of Missouri-Rolla

Member at Large
James Pakala
Covenant Theological Seminary

Member at Large
Steve Stoan
Drury College

MOREnet Representative
Bill Mitchell
Executive Director

Missouri CBHE Representative
Nancy Devino

Executive Committee Advisor
Sara Parker
Missouri State Library

Executive Director
George Rickerson

Dr. Kala M. Stroup
Missouri Commissioner of Higher Education