**2014 Pilot Agreement**

This document is a voluntary agreement to govern participation in the Information Delivery Services (IDS) Pilot. It is based on the premise that each participating institution fully supports the IDS Project’s purpose statement:

“The Information Delivery Services (IDS) Project strives to be an innovative model of library cooperation for effective resource sharing through the promotion of community engagement, staff development, best practices, and research & development.”

By entering into this pilot agreement, your institution agrees to the following:

1. **Resource Sharing**

**1.1 Reciprocal Lending**

Member institutions will not charge each other fees related to the handling of interlibrary loan requests, including per-request lending charges and shipping or postage fees (refer to 1.4). All member institutions agree to abide by the responsibilities outlined in the [American Library Association (ALA) Interlibrary Loan Code for the United States](http://www.ala.org/ala/mgrps/divs/rusa/resources/guidelines/interlibrary.cfm). Each member institution agrees to respond to the requests of other members as expeditiously as possible. While this is an Article Only Pilot and members will not be placed in the IDS Custom Holdings for physical items, the Reciprocal Agreement remains in effect for any loan requests that do come through normal OCLC Resource Sharing channels. IDS Pilot Member collections would only be considered for loanable items after exhausting resources available in NYS.

**1.2 Interlibrary Loan Platform**

All member institutions will use the OCLC ILLiad Resource Sharing Management Software as their interlibrary loan platform. Each member institution will make their best effort to optimize their ILLiad implementation through the adoption of the [IDS Project’s Recommended Best Practices.](http://toolkit.idsproject.org/) All software on your local computers for the purposes of interlibrary loan should be updated to current versions.

**1.3 Data Maintenance**

**1.3.1 Local Holdings Maintenance**

Each member institution agrees to maintain the currency and accuracy of their OCLC local holdings. We strongly recommend a reclamation process making sure your catalog matches your OCLC holdings.

**1.3.2 Link resolver maintenance**

Give permission for the IDS Project to contact Proquest/Serials Solutions, OCLC or EBSCO to add your data to the extracts that are run every two weeks. If your library has an SFX server, please add IDS Project Executive Director (Mark Sullivan: sullivm@geneseo.edu, 585-245-5172) to your SFX Administration permissions so that he can generate the download file from the data directly. This will allow him to keep ALIAS up to date with your holdings. We strongly recommend that print holdings for journals also be loaded into the link resolver knowledge base.

**1.4 Delivery Methods**

**1.4.1 Delivery Methods for Physical Items**

Each member institution agrees to ship requested loan materials using by UPS, Fed Ex or other courier.

* + 1. **Delivery Method for Electronic Articles**

Each member agrees to supply requested article copies using ILLiad’s Odyssey electronic delivery software.

**1.5** **ILLiad data**

* + 1. **Optimized Data Sharing**

Member institutions will provide the IDS Project Technology Coordinator with permission to access to the ILLiad data stored in the locally or hosted SQL server. This data will be shared with other participating libraries and analyzed using a common set of transaction performance measurements.

* + 1. **Security and Encryption**

No user data will be collected through the use of IDS Logic or any other collection method used by the IDS Project. Additionally, all connections will be made using the current standard in data encryption.

**2. Member Contributions**

**2.1 Contributions**

**2.1.1 Member Contribution**

There will not be a fee for the six month duration of the Pilot. If a library wishes to join IDS as a full/article only member following the pilot phase, a prorated membership fee will be determined.

**2.1.2 In-kind Contributions**

Member institutions will make their best effort to support the mission of the IDS Project through in-kind contributions of personnel or other resources. This includes contributing the library’s staff time and talent to IDS cooperative projects. In return, IDS will support professional development for those individuals (§3.1).

**2.2 Member Liaisons**

Each member institution will identify a liaison to the IDS Project Executive Director for coordinating that institution’s participation in the IDS Project. Liaisons are responsible for coordinating IDS Project initiatives at their institution and representing the interests of their institution to the IDS Project Executive Director. Liaisons are requested to provide contact information to the IDS Project, and to use the IDS Project Listserv, which has been established for rapid communication among all participants of the Project.

**2.3 Participation in Mentor Program/Regional User Groups**

All library staff members are strongly encouraged to participate in our free Mentor Program and Regional User Groups.

**2.4** **Conference**

The local IDS Liaison, the Library Director, and staff members are invited to attend the annual summer conference.

**2.5 Cooperative Accountability**

Each member institution agrees to hold itself accountable for implementing and maintaining the [IDS Project’s Recommended Best Practices](http://toolkit.idsproject.org/). Each member institution will strive for specific turnaround time benchmarks of 48 hours for articles and 72 hours for loans. Weekends and holidays are excluded.

**2.6 Quality and Accuracy**

All items transmitted via the IDS Project will be prepared with due attention to high-quality reproduction and bibliographic accuracy.

**3. Member Benefits**

**3.1 Technology**

 **3.1.1 ALIAS**

Article Licensing Information Availability Service provides unmediated article requests, automatic license lookup, and load balancing for all IDS Project libraries.

**3.1.2 IDS Logic**

A combination of ILLiad Server Addon and IDS Technology that provides high efficiency services, such as Lending Availability Module.

 **3.1.3 IDS Dashboard**

The new statistics module for IDS Transactions will provide enhanced, real-time data analysis for all IDS Member Libraries.

**3.2 Professional Development**

 **3.2.1 Mentors**

The IDS Project is nothing if not a community, so it places a great deal of emphasis upon support and collaboration. Central to this is the mentor program, which assigns volunteer applications and systems specialists from current member libraries to each new member. Through both onsite/virtual visits and regular communications, the mentors help the staff at the joining library to configure ILLiad, optimize their workflows, and implement the technical requirements of the IDS Project. If an in-person visit is requested, libraries will be responsible for travel related costs. Libraries may also choose to use virtual methods for mentoring.

**3.2.2 Regional User Groups**

The IDS Project is very committed to the ongoing professional development of our members and the promotion of best practices in our member libraries. Three Regional Users Groups have been formed in New York and will leverage the strengths of the mentor program with the extensive collective knowledge base of our members. Each user group will meet triannually to provide training, facilitate discussion and problem solving, and most importantly build stronger interdependent relationships among members. All member libraries are responsible for travel related costs for meetings.

**3.2.3 Online Learning Institute**

The IDS Project developed the Online Learning Institute and piloted the course “Resource Sharing 101” in January 2014 in order to further extend our dedication to professional development. Additional courses will be added in the coming year.

**IDS Project Pilot Agreement**

On behalf of my library, I am authorized to join the IDS Project Pilot and agree to abide by the terms above.

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| --- |
| IDS Project Liaison name: |
| Title: |
| Contact Phone: |
| Contact Email: |

|  |
| --- |
| Authorized Signature: Date: |
| Name: |
| Title: |
| Institution: |
| Membership Level: Pilot Project - Article Only (Reference 1.4) |
| Contact Phone: |
| Contact Email: |

Please return a signed copy via email, fax, or mail to:

Mark Sullivan

IDS Project Executive Director

Milne Library

1 College Circle

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director@idsproject.org