



INTERLIBRARY DELIVERY SERVICE *of Pennsylvania*
705 N. Shady Retreat Road, Doylestown, PA 18901

Membership Manual

IDS User's Manual
July 2016 Revision

**INTERLIBRARY DELIVERY SERVICE
OF PENNSYLVANIA**

ADMINISTRATIVE OFFICE

**INTERLIBRARY DELIVERY SERVICE OF PENNSYLVANIA
BUCKS COUNTY INTERMEDIATE UNIT #22
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PREFACE

The IDS Users Manual is a reference document for IDS member library staff. The manual describes the purpose and operations of the IDS. It includes information on membership requirements, policies and fees of interest to the library administrator and instructions for shipping and receiving materials for interlibrary loan. Users of this manual should include the *IDS Membership Directory* and the *Bylaws* on their IDS reference shelf, available at idspa.org

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INTERLIBRARY DELIVERY SERVICE

IDS OVERVIEW

1.1 PURPOSE

The Interlibrary Delivery Service of Pennsylvania (IDS) is a non-profit delivery service designed to facilitate the transmittal of interlibrary loan and other educational items among its members. Incorporated in 1977, its goal is to provide a delivery service that enables any resident to have prompt access to the material resources in Pennsylvania owned by public, academic, school and special libraries. Membership has since been extended to include PENNSYLVANIA ACADEMIC LIBRARY CONSORTIUM, INC (PALCI) members external to Pennsylvania. The purposes of IDS as defined by its Bylaws include:

- A. To provide a delivery service designed to facilitate the transmittal of interlibrary loans and other educational items among its membership;
- B. To encourage and promote the development of library and information resources, services, research and cooperation;
- C. To foster interlibrary cooperation;
- D. To seek grants and gifts and to do all such other lawful acts in furtherance of the above stated purposes.

To carry out its mission, IDS may serve as a contracting agency with other organizations and common carriers to provide delivery and administrative services.

1.2 GOVERNANCE

The Board consists of no more than fourteen members, one of who shall be the Commissioner of Libraries or the Commissioner's designee. Elected Board members will serve three-year terms, with four members selected each year. The responsibility for managing the service in accordance with Board-determined policies is contracted to an Administrative Agency.

1.3 BOARD OF DIRECTORS

The Board of Directors is responsible for determining policy, setting service standards, approving contracts, maintaining fiscal accountability and evaluating service quality. The Board's responsibilities as defined by the Bylaws include:

- 1. Exercising authority over the management, acquisitions and disposition of property.
- 2. Supervising the finances, and controlling their investment and utilization.
- 3. Adopting budgets.

4. Determining guidelines for cooperation between IDS and other appropriate organizations.
5. Determining standards for the admission of members and representatives.

The standing committees of the Board are a Nominating Committee, a Planning Committee and a Finance Committee. Ad hoc committees are appointed as needed to serve IDS purposes.

1.4 ADMINISTRATIVE AGENCY

On January 1, 2000, the Bucks County Intermediate Unit #22 in Doylestown, PA was contracted as IDS's managing agency. The services of the IDS Administrative Agency include:

- Office facilities and clerical support for communicating with the membership.
- Bookkeeping, accounting and billing activities.
- Administrative support for supervising record keeping, preparation of reports, and negotiating and communicating with the contracting carrier.
- Arranging and supporting Board, Committee and Annual Membership meetings.

1.5 CONTRACTED SHIPPING CARRIER

In 1986, the IDS Board entered into an agreement with the United Parcel Service (UPS) to provide a delivery service for library materials. Renewal of the agreement or contract occurs on a cyclical basis. Investigation into other carriers occurs as the IDS Board deems necessary.

MEMBERSHIP

2.1 QUALIFICATIONS

IDS membership is open to public, academic, school and special libraries, and library-related non-profit organizations in Pennsylvania. Membership in IDS will be offered upon request to PALCI members that are not located in Pennsylvania. Members are required to pay membership fees according to the fee schedule established by the Board of Directors

2.2 MEMBERSHIP APPLICATION AND AGREEMENT

Applications for membership may be submitted to the Administrative Agency at any time during the year. Please contact the IDS Administrative Office for the application forms. There are two classes of IDS usage:

Member

A library member independently incorporated or serving a single institution can be considered for IDS member status. The library or its parent institution is the site for shipping and receiving deliveries. The library is listed in the Membership Directory and has full voting privileges. A member may also designate affiliate sites.

Affiliate

A library administratively related to a member of IDS can be considered for IDS affiliate status. An affiliate library is eligible to ONLY RECEIVE shipments from other IDS members. The method of shipment and return of materials by the affiliate is established by the full IDS member library. All affiliates are listed in the Membership Directory.

2.3 MEMBERSHIP FEES

The Board determines full and affiliate member fees annually.

Full membership fees for the upcoming year are based a member's total package count for the previous four quarters of shipping.

Affiliate membership fees are based on the number of affiliates that a full member designates. The full member will be billed for and is responsible for the payment of all fees assessed on it and its affiliate sites. Apportionment of fees among full members and their affiliates is internal to the member's organization, and is independent of IDS.

A new member is assessed a membership fee based on projected use. The membership fee for new members is invoiced following approval of the membership application.

The membership fee for renewing members is invoiced annually before the first month of the new calendar year (January). Annual fees are subject to supplemental assessments during the period in which they are in effect, to cover:

- Increases assessed by the Contracting Carrier, covering such items as fuel adjustment charges, labor contracts, etc.
- Unexpected increases in service costs or the number of items shipped. IDS is managed on a fixed budget which sets forth allowances for specific purposes, each having a definite monetary limitation. Expenses exceeding projections and available funding must be covered by additional income. The Bylaws forbid the Board from incurring obligations, which exceed IDS' current assets less outstanding obligations.

2.4 TERMINATION OF MEMBERSHIP

By the Member

A member in good standing may resign from IDS by signifying its intention in writing to the IDS Administrative Office. Resignations become effective at the end of the calendar year (December 31), or earlier, if the Board agrees to an earlier termination. Annual fees or service assessments paid by a resigning member are not refunded to the member when service is terminated before the end of the IDS calendar year.

By IDS

The IDS Board may suspend services or revoke membership if a member fails to pay fees or service assessments or for member conduct which is detrimental to the welfare of IDS. IDS may temporarily suspend or terminate delivery services if it cannot maintain satisfactory services, or if such service incurs deficits in excess of current assets.

2.5 MEMBERSHIP DIRECTORY

IDS compiles and makes available online a membership directory listing the names of all members and their affiliates, together with shipping addresses. This directory should be consulted to find the full and correct IDS shipping address for members and affiliates.

Updates to the online directory are made throughout the year: <http://idspa.org/>

IDS members are expected to cooperate in the compilation of the directory by completing the member renewal process via the Library Manager (<https://ids.bucksiu.org/>) by the due date as explained in the IDS Member Renewal Email. Members are also expected to report any changes in listing and corrections, through the same process, immediately.

2.6 ANNUAL MEETING

The annual membership meeting is usually held in conjunction with the Pennsylvania Library Association annual conference in the fall. *On any matter requiring a vote at this meeting, only full members in good standing may participate.* Announcements of this meeting and ballots for the election of new IDS board members are issued each August via direct mail or email to the Library Director and ILL Supervisor of each member institution.

SHIPPING, RECEIVING, DELIVERY & PICKUP PROCEDURES

3.1 TYPES OF MATERIALS

Library materials, which are intended for the direct use of library patrons, are acceptable for IDS delivery. Examples of library materials are: books, periodicals, microforms, film reels, VHS format, DVD or other video recordings, CDs or other sound recordings, transparencies, pictures, and photographs.

Materials not intended for direct use of library patrons are not acceptable for IDS delivery. These include but are not limited to: OCLC-type archive tapes, equipment, shelflist cards, or supplies of bookmarks, fliers or announcements.

For materials that do not meet IDS requirements, arrange shipment with another carrier.

3.2 PACKAGING REQUIREMENTS

Each item shipped must be wrapped or packaged to protect it from damage. Examples of adequate protection include:

- For a single book or two, a corrugated box or padded bag (Jiffy bags are one brand of padded bags), securely fastened with staples and tape if needed.

See the IDS website for negotiated discounts on Mailing Bags.

<http://www.idspa.org/index.php/membership/resources>

- For several books, a corrugated box secured all the way around with reinforced tape.
- A 9" x 12" envelope for photocopies.
- For items such as DVDs and CDs, bubble wrap or cushioning materials inside the package are recommended.

Because UPS shipping charges to IDS are based on weight, it is IDS policy that no package, whether it is composed of single or multiple items, may weigh more than 30 lbs.

The length x width x height of a package cannot exceed 5184 cubic inches.

Extra charges will apply if materials do not meet the criteria listed above. A \$25 service charge, plus UPS charges, will be imposed by IDS for shipments exceeding weight and dimension limits, shipments with declared values in excess of \$100, and shipments sent via Next Day or Second Day AIR. IDS reviews all shipments on the weekly UPS Invoices for errors by both member libraries and UPS.

3.3 LABELING

A shipping label including the following information must be securely affixed to each wrapped package:

- Destination library's name, room number if appropriate, precise street address, city and zip code
- Shipping library's name, street address, city and zip code.

3.4 SHIPPING PROCEDURES

There are two ways to send and record packages within the UPS/IDS system. They are as follows:

SHIPPING VIA UPS WORLDSHIP: This free software provides users with fast, accurate shipping via their computer. The software is available at <http://www.ups.com/content/us/en/bussol/browse/worldship.html>. Since the software is updated regularly, the best instructions to follow for shipping procedures are the ones provided with the software from UPS

SHIPPING VIA THE INTERNET: Online shipping is also available to users via the Internet. Just go to <http://www.ups.com> to register and follow the easy on-screen directions to enroll in this type of shipping from any computer in your library with Internet access. Again this system is updated regularly so it is wisest to follow UPS instructions from the website.

3.5 TRANSIT TIME

Under normal conditions, transit time for materials under the UPS agreement is expected to be within two days of pick-up.

3.6 PICK-UP SCHEDULES

For high volume member libraries, UPS picks up shipments each day, Monday through Friday.

Low volume shippers will be designated Smart Pickup locations. UPS Smart Pickup® is a scheduled pickup option that automatically notifies a UPS driver to make a pickup at your location on the same day that you process a shipment using WorldShip®, UPS Internet Shipping, or UPS CampusShip® prior to the notify time. UPS Smart Pickup® combines the predictability of an automatic Daily Pickup with the flexibility of requesting a pickup on demand. Having UPS come to your business only when you have a package to ship saves fuel and can reduce carbon emissions. More information about SmartPickup can be found on the IDS website: <http://idspa.org/index.php/component/content/article/83-ids/shipping/99-ids-smart-pickup-option>

IDS cannot control conditions that could impact UPS' ability to deliver services; such conditions could include: physical or natural disasters, militancy or unrest in the vicinity of the library, and national or local emergencies. In case of strikes, UPS will not cross picket lines but may make arrangements for alternate pickup/delivery sites.

3.7 PICKUP AND DELIVERY SITE

Each member is responsible for establishing a location for deliveries and pickups. If the library wishes to have IDS materials delivered into a specific room within a building, the room number must be included in the address. A UPS representative will contact members for directions to the site and information on schedules. Someone will have to sign for all deliveries.

3.8 SHIPPING NATIONWIDE AND TO NON-MEMBERS

Under the extended pilot project, all member libraries are permitted to ship to non-IDS PA libraries.

The current pilot program, which began April 1, 2015, permits members to ship nationwide, to all libraries. Shipping to non-member and nationwide libraries is voluntary, since participation can move a member into the next membership tier for the following year.

There will be a monthly \$25 Service Charge by IDS, plus UPS charges, for items sent via IDS to non-libraries. DO NOT use the IDS shipping account for shipments to non-libraries.

3.9 RECORD KEEPING

Record keeping functions, including the analysis of shipping statistics, will be provided by the Administrative Agency from billing data supplied by UPS. The shipper's copy/daily log printout of the pickup record retained by the member may be used for referral on questions concerning shipments and IDS auditing.

Occasionally, members may be asked to participate in the evaluation of services to determine their effectiveness. Questionnaires, interviews and membership meetings may be used for this purpose.

PROBLEM SOLVING MECHANISMS

4.1 NON-RESPONSE

Problems with UPS should first be reported to the driver. If the problem is not resolved, it should be reported to the local UPS Customer Service Representative through the district phone number listed in the local telephone directory. If the problem persists beyond this point, the IDS Administrative Office should be contacted by telephone or email.

4.2 SCHEDULES

Problems with delivery schedules should be reported by the member to the UPS Customer Service Department through the district phone number listed in the local telephone directory (or by calling 1-800-PICK-UPS for customer service).

4.3 INSURANCE FOR DAMAGED, MISSING, or LOST MATERIALS

All IDS packages shipped through UPS are insured up to \$100. Items exceeding this value, if indicated on the pick-up record, will result in an added charge.

If your library needs to file a claim with UPS for a lost package, please call 1-800-742-5877. IDS does not file claims for libraries, as the library has the information about the contents and value of the package.

Members can report a lost or damaged package online up to five months after the date of expected delivery. If you choose to report a lost or damaged package to UPS Customer Service, you can do so up to nine months from the date of expected delivery. UPS' statement on this timeframe can be found [here](#).

The owning library should be compensated once a settlement has been negotiated between the member library and the carrier (UPS).

4.4 FEES AND INVOICES

Questions concerning IDS fees and billing should be addressed to:

IDS Administrative Office
c/o Bucks County I.U. #22
705 North Shady Retreat Road
Doylestown, PA 18901

Phone #: 215-348-2940, x1625

Fax #: 267-897-9220

Email: IDS@bucksiu.org

4.5 QUESTIONS ON POLICY

The IDS Board is responsible for establishing policy and evaluating service effectiveness. Members are encouraged to attend membership meetings and to submit their questions or comments in writing to the Board or the Administrative Agency. A list of the Board of Directors appears on the IDS website.

4.6 UPS MATTERS

New members may receive invoices directly from UPS before the new account is fully activated in the IDS consolidated billing account. These invoices should be sent immediately to the IDS Administrative Office and not paid by the member library.

Any direct mailings from UPS to IDS member libraries announcing new service options should be disregarded and only the policies outlined in this manual followed. Changes, should they occur, will be negotiated in advance and announced by the Board. Consult Board minutes posted quarterly on the IDS website.

IDS

\$25.00 Checklist

All errors will incur a \$25.00 service fee per invoice, plus UPS charges.

To avoid added penalties, consult the list below for infractions:

- Shipments sent via Next Day or Second Day Air or other special handling.
- Packages shipped to non-libraries
- Packages exceeding the 30 lb. maximum weight limit.
- Shipments exceeding the size limit. If the cubic size in inches is less than 5,184, use the actual weight of the package.
- Packages cannot exceed the \$100.00 maximum value

If your package **DOES NOT** meet the IDS requirements, it must be shipped by some other method.