

July 1, 1999

COPPUL-ICPSR Federation Agreement

This memorandum is intended to communicate the terms of the federated membership of the Canadian Council of Prairie and Pacific University Libraries (COPPUL) in the Inter-university Consortium for Political and Social Research (ICPSR). Hereafter, the COPPUL federated membership will be known as A COPPUL Consortium of Library Electronic Data Services. (ACCOLEDS).

1.0 The ACCOLEDS Federated Membership

1.1 The institutions within the region of the Council of Prairie and Pacific University Libraries and/or participating in the ACCOLEDS federation are:

The University of Alberta
The University of British Columbia
The University of Calgary
Dalhousie University
The University of Lethbridge
The University of Manitoba
The University of New Brunswick
The University of Northern British Columbia
The University of Regina
The University of Saskatchewan
Simon Fraser University
The University of Victoria
The University of Winnipeg

In return for an annual membership fee (see 1.4), faculty and students at these institutions will be entitled access to ICPSR resources and programs according to the terms described in sections 2.0 and 3.0 below.

- 1.2 For the determination of membership fees, the following institutions are recognized as category A institutions: the University of Alberta, the University of British Columbia, the University of Calgary, Dalhousie University, the University of Manitoba, the University of New Brunswick, the University of Regina, the University of Saskatchewan, Simon Fraser University, and the University of Victoria. Identified as category B institutions are the University of Lethbridge and the University of Winnipeg. Identified as a category S institution is the University of Northern British Columbia.
- 1.3 An annual fee in U.S. dollars will be assessed the Federation. This amount is based on a federation of twelve (13) institutions. Should the federation add new members, this fee will be adjusted (see 4.3). The arrangement for the payment of the federation's annual fee is described in 2.2 below.
- 1.4 Nothing in this agreement precludes the addition of other institutions within the region to the ACCOLEDS federation subject to mutually satisfactory negotiations between the participating institutions and the ICPSR and subject to mutually satisfactory amendment of the terms of this agreement (see 4.3).

- 1.5 In the interest of enabling opportunities for teaching and research, it is understood that the ACCOLEDS federation will be entitled to distribute ICPSR data resources on a limited basis to individuals at institutions within the region of the federation that are potential members of the federation and of the ICPSR. The ICPSR shall be informed of such distributions. Furthermore, these institutions will be encouraged formally to join the federation and the ICPSR and will be informed that such distributions will not become a substitute for membership in the ICPSR.

2.0 Relations between a Central Federation Contact and the ICPSR

- 2.1 The University of Alberta shall serve as the hub (or contact) institution between ACCOLEDS and the ICPSR. All requests for data and services from institutions within ACCOLEDS will be channeled through this institution.
- 2.2 A single invoice for the total federation fee will be sent to the Executive Director of COPPUL on or about July 1 of each year. A single payment will be made on behalf of the federation by the COPPUL Executive Director, who will assume the responsibility of collecting fees from the other members of the federation.
- 2.3 To the extent possible, the hub institution will ensure that data received from the ICPSR will be available to all members of the federation thereby alleviating the need to re-order data from the ICPSR.
- 2.4 Whenever documentation is available in hard copy only, the hub will receive two copies. Additional copies of documentation will be provided at cost. The ACCOLEDS federation is entitled to duplicate in any form all documentation for further distribution among its members.

3.0 Institutional Relations between Federated Members and the ICPSR

- 3.1 All ICPSR data resources will be available to faculty and students of federation affiliates under the same terms as to faculty and students located at individual institutional affiliates of the ICPSR. However, requests for data and services from a federation affiliated will be communicated to the ICPSR through the federation's hub (see 2.1). In filling a request for data, the ICPSR will supply data to the hub institution for subsequent dissemination to the requesting institution.
- 3.2 Each member institution of ACCOLEDS will appoint an Official Representative in the ICPSR.
- 3.3 Any individual at a federation institution may communicate directly with the ICPSR staff about matters related to data reliability, adequacy of documentation, special data requests, difficulties encountered in the use of data and related services and the like. Nothing in this agreement precludes such direct contacts by the Official Representatives or members of the academic community at an ACCOLEDS institution.

- 3.4 Official Representatives within the federation will receive one copy of the codebooks that are routinely mailed for ICPSR studies, and copies of periodic ICPSR informational mailings. Occasionally the hub coordinator may be sent materials that will need to be distributed to the official representatives at the federation affiliates.
- 3.5 Faculty and graduate students at institutions within the ACCOLEDS federation will be entitled to participate in the annual ICPSR Summer Training Program under the same terms as faculty and graduate students at individual institutional affiliates of equivalent membership categories. Eligibility for ICPSR financial support for participation will be equivalent to that provided for five (5) individual institutional affiliates of equivalent membership categories. If the number of institutions within the federation changes, this number will be adjusted accordingly. Selection of participants and disbursement of funds will be in accord with procedures established by the federation.
- 3.6 Faculty and graduate students from federation institutions will also be eligible for participation in any special workshops or conferences organized under the auspices of the ICPSR on the same terms as individual institutional affiliates. Nothing in this agreement precludes participation of ICPSR staff at the invitation of federated institutions in special conferences, workshops, or other programs organized by the federation and in which ICPSR cooperation and participation may be mutually beneficial.
- 3.7 All members of the federation will be entitled to the same ICPSR computer assistance services as individual institutional affiliates. Computer software distributed by the ICPSR will be available to federation members under normal member arrangements.
- 3.8 Individuals from institutions within the ACCOLEDS federation will be eligible for election and/or appointments to the ICPSR Council, advisory and other committees on the same terms as their counterparts at other ICPSR member institutions.
- 3.9 All institutions within the federation will be invited to participate in meetings of the Official Representatives. The federation will be entitled to designate five (5) participants to receive the same level of individual travel support as provided by the ICPSR to Official Representatives of individual institutional affiliates. If the number of institutions within the federation changes, this number will be adjusted accordingly. Selection of participants in the meetings of ICPSR Official Representatives will be in accord with procedures established by the federation.

4.0 Duration and Modifications to this Agreement

- 4.1 This membership agreement will apply for a period of three years from July 1, 1999 through June 30, 2002. The fee for the ACCOLEDS federation for FY00 is \$51,157 US\$. This federation fee discount is based on the number of participating institutions; with 12 members, a 45% discount will be applied to the calculation of the invoice. An additional discount of 20% for Canadian federations has also been applied; this discount is applied solely to make clear that the invoiced amount is not subject to further reduction due to currency differentials.

On August 1, 2000 the University of Winnipeg joined the ACCOLEDS federation. The membership fee for the University of Winnipeg will be pro-rated from August 1, 2000 – June 30, 2001, with the membership invoice being sent directly to COPPUL in the amount of \$2,830.00. In fiscal year 02 that covers membership from July 1, 2001 – June 30, 2002 the University of Winnipeg will be included on the ACCOLEDS federation invoice.

As of August 1, 2000, the Federation includes 13 members, and a 45% discount will be applied to the calculation of the invoice for the Federation in fiscal year 02. An additional 20% for Canadian federations will also be applied; this discount is applied solely to make clear that the invoiced amount is not subject to further reduction due to currency differentials.

- 4.2 Fees for subsequent years will conform to the ICPSR federated fee structure and will usually include an increase for inflation. No adjustments in fees for subsequent years shall be imposed without approval of the ICPSR Council and with a minimum of twelve (12) months notification. Notification of a decision by either party to terminate this agreement at the end of the three-year period shall be provided no later than June 30, 2001.
- 4.3 The addition of a new member to the federation prior to the end of a three-year commitment shall result in a fee adjustment based upon the ICPSR federated fee structure. The hub institution will be responsible to communicate to the ICPSR a request to increase the size of the federation. The starting date for the inclusion of a new federated member will be negotiated with the ICPSR and will determine when the adjusted fee will begin.

5.0 Implementation

- 5.1 This agreement shall be considered in effect upon signature by appropriate officials for the parties identified within this agreement.
- 5.2 Copies of this agreement will be made available to all signatories.

SIGNATURE FOR ICPSR

SIGNATURE FOR COPPUL/ACCOLEDS

NAME AND TITLE, ICPSR

DATE _____

NAME AND TITLE, COPPOL/ACCOLEDS

DATE _____