

**Service Policy Agreement  
Between  
the MOBIUS Consortium Office  
and  
Members of the MOBIUS Consortium**

**1. Introduction and Purpose.**

1.1. Introduction.

The Missouri Coordinating Board for Higher Education, on behalf of the MOBIUS Consortium, and the University of Missouri, has executed a Host Institution Agreement that designates the University of Missouri (UM) as the host institution for the MOBIUS Consortium. In accordance with the provisions of that agreement, UM established a unit called the MOBIUS Consortium Office within the Information Technology Division to carry out the terms of the Host Institution Agreement.

1.2. Purpose.

As specified in Section 7.2 of the Host Institution Agreement between the University of Missouri and the Missouri Coordinating Board for Higher Education, the purpose of this Service Policy Agreement is to specify the direct services provided by the MOBIUS Consortium Office to the Members of the MOBIUS Consortium, to establish the standard of quality for the services provided and to specify the process by which service levels will be evaluated and reviewed. This Service Policy Agreement is, upon its signing, incorporated into the Host Institution Agreement as an amendment to that agreement.

**2. Definitions.**

2.1. MOBIUS.

The name MOBIUS refers to the consortium of Missouri academic institutions that has organized itself, under the sponsorship of the Missouri Coordinating Board for Higher Education, to pursue those goals defined in its Memorandum of Understanding.

2.2. Common Library Platform.

The Common Library Platform (CLP) is the project, jointly funded by the state of Missouri and by the members of the Consortium, to implement direct patron borrowing among Consortium members using automated library system software and hardware from one vendor.

2.3. MOREnet.

MOREnet is the internet service and network services provider for education and state government in Missouri and has been designated by the Consortium as the network services provider for the CLP.

#### 2.4. Member.

In this agreement, the label Member refers to a single institution that is a member of the Consortium.

#### 2.5. MOBIUS Consortium Office.

In this agreement, the MOBIUS Consortium Office is the unit, headed by the MOBIUS Executive Director and established by the University of Missouri within its Information Technology Division for the purpose of carrying out the provisions of the Host Institution Agreement.

### 3. Term.

The initial term of this agreement will begin on the date it is signed and extend until June 30, 2000. Thereafter it will be renewed as specified in Section 3.3 of this Agreement.

### 4. MOBIUS Systems.

#### 4.1. Definition.

The automated library systems and electronic information services described in this section of this Agreement will be known collectively, for the purposes of this Agreement, as MOBIUS systems.

#### 4.2. CLP System.

The CLP project uses integrated library system software from a vendor which is currently under contract with UM as a result of a competitive bid process. Each CLP system includes the following functional modules:

- Direct patron borrowing
- Public Access Catalog including access to remote systems and web interface
- Acquisitions
- Bibliographic maintenance (with cataloging and authority control)
- Circulation control
- Electronic reserves
- Serials control
- Management information reporting
- Materials booking
- Full standards compliance (Z39.50 and Z39.2)
- Reports modules
- Masking records capability
- URL support
- Multimedia links
- Link to serials holdings from citation databases
- Ability to load electronic databases
- Conversion support

#### 4.3. MOBIUS Databases.

The MOBIUS Consortium Office may arrange, on behalf of the Consortium, Member access to electronic information resources, including reference works, abstracting and indexing databases,

and electronic journals. In this Agreement these resources are known collectively as the MOBIUS databases. The MOBIUS Consortium will determine selection of electronic information resources.

#### 4.4. Additional Systems.

Additional automated library systems and electronic information services that are licensed for use by Consortium members are automatically added to this Agreement.

### 5. Services.

- 5.1. System Implementation. The MOBIUS Consortium Office is responsible for managing and overseeing, in cooperation with vendors and Members, all aspects of new MOBIUS system implementations, including hardware and software configuration and installation, database conversion and loading, and staff training.
- 5.2. Help Desk. The MOBIUS Consortium Office will provide help desk services to take reports of problems affecting any of the MOBIUS systems. Problem reports from Members will be accepted via telephone or e-mail. When a problem is reported, help desk personnel will document the report of the problem, investigate and analyze the problem, take action to resolve the problem if possible and report back to the reporting person.
- 5.3. Problem Tracking System. The MOBIUS Consortium Office will use an automated system for tracking and managing problem reports and projects and provide access to information from this system to Members.
- 5.4. Routine System Maintenance. The MOBIUS Consortium Office is responsible for performing all routine database and system maintenance tasks that are part of making MOBIUS systems operational. The MOBIUS Consortium Office will identify the specific routine tasks that are performed, give the schedule on which they are performed and provide statistics from the most recent instance of the task on a web site provided for Members.  
  
Other system maintenance tasks are performed as needed or on request. These tasks include maintenance of system tables, modification of system displays and the like. These tasks will be scheduled in consultation with Members and implemented at mutually acceptable times.
- 5.5. New Software Releases. The MOBIUS Consortium Office is responsible for installing new releases of software for MOBIUS systems.
- 5.6. Data Communications. Data communications capabilities between the various service locations of each Member are not covered by this Agreement. However, in the event of a data communications problem that affects a Member's ability to access MOBIUS systems, the MOBIUS Consortium Office will assist that Member in identifying and resolving the problem.
- 5.7. Training. The MOBIUS Consortium Office will develop and offer training programs for MOBIUS systems. The training programs to be developed will be determined in consultation with the Members. All training programs developed by the MOBIUS Consortium Office with respect to the MOBIUS systems will be available to any Member on request. In consultation with Members, the MOBIUS Consortium Office also will coordinate and provide support for training by vendor organizations at mutually acceptable times.
- 5.8. Documentation. All MOBIUS system user documentation purchased by or developed by the MOBIUS Consortium Office will be shared with each Member.

- 5.9. Special Projects. The MOBIUS Consortium Office will provide appropriate support and expertise in the event of special projects initiated by a Member in connection with the MOBIUS systems. An example of such a project would be the loading of a special collection of bibliographic records into the Member's catalog database.
- 5.10. Statistics. The MOBIUS Consortium Office has the responsibility to develop statistical information regarding the use of MOBIUS systems. The MOBIUS Consortium Office will make available to each Member statistical information concerning that Member's use of MOBIUS systems.
- 5.11. Vendor Relations. Because the MOBIUS Consortium Office is the primary point of contact between the Members and the vendors who provide its systems, information products and services in support of MOBIUS systems, the MOBIUS Consortium Office is responsible for such activities as advocating for Members with respect to system capabilities and modifications, RFP development, procurement management, contract negotiation and management, arranging trials of products and services, obtaining cost quotations and the like. The MOBIUS Consortium Office is responsible for helping the Members evaluate new opportunities and products.

## **6. Standards.**

### 6.1. System Availability.

MOBIUS systems are mission critical systems for the Members. MOBIUS systems will be available to users 24 hours per day, 7 days per week. In the event that it is necessary to schedule downtime on a MOBIUS system for any reason, the MOBIUS Consortium Office will inform affected Members as far in advance as possible, but no less than 48 hours in advance, except in case of emergency over which the MOBIUS Consortium Office has no control. In case of unscheduled downtime for any MOBIUS systems, the MOBIUS Consortium Office will inform Members of the problem and expected time of resolution as soon as possible after becoming aware of the problem.

### 6.2. System Capacity.

It is the responsibility of the MOBIUS Consortium Office to insure that the locally mounted and operated MOBIUS systems are configured appropriately in terms of memory, processors and disk storage to accommodate the needs of the Members.

### 6.3. System Response Time.

The acceptable system response time for the CLP systems is defined in accordance with the response time specifications documented in the contract between the CLP system vendor and UM. The MOBIUS Consortium Office is responsible for insuring that these specifications are met and maintained. For other MOBIUS systems, the MOBIUS Consortium Office will endeavor to insure that system performance is at acceptable levels at all times. For remote information services, it is the responsibility of the MOBIUS Consortium Office to work with the service provider to insure adequate performance.

### 6.4. Network Capacity.

The MOBIUS Consortium Office through MOREnet will work to insure that the networks used to deliver MOBIUS system services are appropriately configured, sized, upgraded and managed.

#### 6.5. Training Assessment

Training programs developed and offered by the MOBIUS Consortium Office will be evaluated by the MOBIUS Executive Committee on how well they meet the needs of the Members as the Members define these needs.

#### 6.6. Support.

- 6.6.1. The MOBIUS Consortium Office will provide help desk services between 8 a.m. and 5 p.m. Monday through Friday, except for official UM holidays. These hours are defined as the primary support hours. Help desk services during other hours will be available either by pager or through backup help desk arrangements with another service organization, such as MOREnet.
- 6.6.2. During the primary support hours a progress report will be provided to the affected Members 30 minutes or less following the initial problem call for problems that prevent a Member's use of a MOBIUS system or a major portion thereof or in the case of unscheduled downtime. Additional progress reports will be provided to the affected Members periodically until the problem is resolved. During other support hours, calls to the MOBIUS Help Desk will be responded to within one hour, and progress reports will be provided as during the primary support hours. Vendor support of MOBIUS systems is governed by the terms of the agreements between UM and those vendors.
- 6.6.3. Routine service requests and reports of minor system problems will be acknowledged by the MOBIUS Consortium Office and assigned to a staff person within one working day of time of receipt.

#### 6.7. New Software Releases

The MOBIUS Consortium Office will notify Members of the availability of new software releases for MOBIUS systems as soon as the information is available and will consult with Members when scheduling the installation of such releases.

#### 6.8. Special Projects.

When a Member requests a special task or project, the MOBIUS Consortium Office will assess the task, determine the resources required, and determine under what circumstances the project or task can be completed. If implementing a special project would noticeably and negatively impact services provided to other Members, the MOBIUS Consortium Office would ask the requesting Member first to inform the affected Members and then to obtain approval from the MOBIUS Consortium according to procedures established by the Consortium.

#### 6.9. Assessment and Remedies.

Section 8 of the Host Institution Agreement specifies the assessment process and remedies that apply to the Service Policy Agreement.

#### 6.10. Modification of Service Levels.

No modification of the service levels specified in this Agreement may be made without approval of the signatories to this Agreement.

APPROVED AND ACCEPTED:

For the Missouri Coordinating Board for Higher Education:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: Eldon Wallace Title: Associate Commissioner for Finance

For the MOBIUS Consortium

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: Cathye Dierberg Title: Chair, MOBIUS Executive Committee

For the MOBIUS Consortium Office

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: George Rickerson Title: Executive Director

For the University of Missouri:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: Ralph Caruso Title: Vice President for Information Technology and Systems