



Best Practices for Exiting a Shared Print Program

This best practice pertains to circumstances when a library finds it necessary to exit a shared print program either when current retention commitments expire or while the current commitments are still active. Shared print programs are encouraged to discuss the necessity for remaining in a program and retaining commitments, but at times libraries may still need to make the difficult decision to exit a program.¹ The best practice for exiting a shared print program takes into consideration that each program may have its own MOU, policies, funding, transferring of commitments, and disclosure practices. Since practices for a shared print program differ from those for a member institution, these best practice guidelines include sections and practices for both programs and member libraries. In the absence of any program-defined policies and practices for exiting a shared print program, libraries are encouraged to follow the best practices outlined in this document, in order to safeguard the integrity of collective collections. Or, if a library is interested and able to go beyond the requirements of its program, these best practices can serve as a guide.

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Shared Print Program's Best Practices

Each level presumes all checks of any/all preceding levels.

Good

- If guidelines for exiting a program are not included in MOU, develop policies and procedures for this process.
- Encourages transferring of commitments
- Update metadata in appropriate disclosure systems
- If exiting library continues to retain commitments for the program, they are included on relevant email lists that pertain to the policies and procedures governing program retentions.

¹ The Best Practices Working Group plans to develop a future best practice around communicating the importance of remaining in a shared print program or retaining commitments already made.

Better

- Encourages transferring of commitments and provides guidelines and procedures for doing so

Best

- Guidelines for exiting a program are included in the MOU and include timeline for notification period and procedural information like transferring of commitments, updating metadata, etc.
- MOU suggests that if a transfer of commitment or transfer of physical item is not possible, the exiting library retains commitments on behalf of the program, and continues to be overseen by the program (e.g. if a past member library wants to withdraw previously made commitments they are encouraged to submit a request through the program or automatically look for a reallocation/transfer partner in the program).
- Requires transferring of commitments and provides guidelines and procedures for doing so
- Works with member libraries considering exiting a program to provide collection data when possible

Aspirational

- Program funding includes reserves to prevent an exit from increasing member fees or causing a decline in services.

	Best Practice	Good	Better	Best	Aspirational
MOU Considerations See Best Practice for MOUs for more details.	Guidelines for exiting a program are included in the MOU and include timeline for notification period and procedural information like transferring of commitments, updating metadata, etc.			X	
	If guidelines for exiting a program are not included in MOU, develop policies and procedures for this process.	X			
	MOU suggests that if a transfer of commitment or transfer of physical item is not possible, the exiting library retains commitment on behalf of the program, and continues to be overseen by the program (e.g. if a past member library wants to withdraw previously made commitments they are encouraged to submit a request through the program or automatically look			X	

	for a reallocation/transfer partner in the program).				
Transferring Commitments See Best Practice for Transferring Commitments for more details.	Encourages transferring of commitments	X			
	Encourages transferring of commitments and provides guidelines and procedures for doing so		X		
	Requires transferring of commitments and provides guidelines and procedures for doing so			X	
	In cases when there is a single commitment on a title, the program encourages transferring of physical items through donation or other state approved policy when a member exits or the exiting library retains commitment on behalf of the program when possible.				X
	In cases when there is a single commitment on a title, the program encourages creating a <u>digital surrogate</u> of the item on behalf of the program				X
Data Considerations	Works with member libraries considering exiting a program to provide collection data when possible			X	
	Update metadata in appropriate disclosure systems	X			
Communication	If exiting library continues to retain commitments for the program, they are included on relevant email lists that pertain to the policies and procedures governing program retentions.			X	
Budgeting	Program funding includes reserves to prevent an exit from increasing member fees or causing a decline in services for other members.				X

Member Libraries of Shared Print Program's Best Practices

Each level presumes all checks of any/all preceding levels.

Good

- MOU Considerations:
 - In lieu of program formal procedures or policies for transferring commitments, the library considers transferring commitments. See [Best Practices for Transferring Commitments](#).
- Data Considerations:
 - Update metadata in appropriate disclosure systems

Better

- Follow MOU guidelines regarding withdrawal of program and transferring of commitments
- Follow MOU guidelines regarding transferring of commitments
- Member libraries that officially cease to participate in a shared print program will agree to continue to retain committed materials as defined in the MOU. These libraries will also continue to stay up-to-date on program changes, the governance of committed items, and technological developments, and they will maintain data updates and notify the shared print program of changes in their collections. However, these libraries will give up their roles in program governance.

Best

- Transfer ownership of physical materials to other shared print program member library or another shared print program
- Transfer ownership of physical materials to other shared print program member library regardless of the number of commitments on the item
- Prior to exiting a shared print program, library has reviewed any retention commitments they may retain on behalf of the program and assessed if immediate or near-future deselection may be a factor

	Best Practice	Good	Better	Best	Aspirational
MOU Considerations See Best Practice for MOUs for more	In lieu of program formal procedures or policies for transferring commitments, the library considers transferring commitments. See Best Practice for Transferring Commitments .	X			
	Follow MOU guidelines regarding		X		

<i>details.</i>	withdrawal of program and transferring of commitments				
Transferring Commitments <i>See Best Practice for Transferring Commitments for more details.</i>	Follow MOU guidelines regarding transferring of commitments		X		
	Transfer ownership of physical materials to other shared print program member library or another shared print program			X	
	Transfer ownership of physical materials to other shared print program member library regardless of the number of commitments on the item			X	
Data Considerations	Update metadata in appropriate disclosure systems	X			
	Prior to exiting a shared print program, library has reviewed any retention commitments they may retain on behalf of the program and assessed if immediate or near-future deselection may be a factor			X	
Communication	Member libraries that officially cease to participate in a shared print program will agree to continue to retain committed materials as defined in the MOU. These libraries will also continue to stay up-to-date on program changes, the governance of committed items, and technological developments, and they will maintain data updates and notify the shared print program of changes in their collections. However, these libraries will give up their roles in program governance.		X		