



Best Practices for Expiring Commitments

The foundation of a shared print program is the ability of member libraries to rely on each other's commitments to retain volumes for an agreed upon number of years. The majority of shared print programs have an expiration date for these commitments. This best practice for expiring commitments is focused on programs, rather than member libraries, to help shared print programs plan for and deal with the issues inherent with expiring commitments.

Commitments are central to ensuring the availability of the scholarly record. As such, there are a number of existing best practices that align with the Best Practice for Expiring Commitments:

- A Program that is considering how best to address commitment duration and changes should review the [Best Practice for Retention Period and Survivability](#)
- A Program that is addressing a member library's withdrawal should review the [Best Practices for Exiting a Shared Print Program](#)

Best Practice

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

Good

- The shared print program continues to monitor commitment expiration dates or renewal dates in order to allow ample time for planning.

Better

- Shared print programs start preparing for and addressing expiring commitments at least two years prior to the commitment expiration date.
- Shared print programs are able to provide commitment data to members regarding their expiring commitments.
- As expiration dates approach, shared print programs ask members to extend commitments, and if that is not possible, transfer the commitments to another member.

Best

- The program considers circumstances that warrant extending or reducing the commitment periods for certain kinds of materials.
- The MOU or related Policy Guidelines document a process for extending the length of commitments in advance of expiration (See [Best Practice for Retention Period and Survivability](#) for suggestions on length of commitments to ensure survivability).

- The shared print program is able to provide commitment data that includes overlap analysis within the program to members regarding their expiring commitments.
- If a member is not able to extend a commitment or the program cannot transfer the commitment to another member, the program has established policies and practices for asking members to transfer the physical item to another member.
- If a commitment cannot be transferred within the same program, the shared print program seeks other shared print programs that could retain the item if it is not committed for retention by other programs.
- The shared print program requires members to update commitment data in local and national systems.

Aspirational

- The shared print program provides commitment data that includes overlap analysis within the program and other shared print programs to members regarding their expiring commitments to facilitate renewal of commitments.

Best Practices for Shared Print Programs	Good	Bette r	Best	Aspir ationa l
The shared print program continues to monitor commitment expiration dates or renewal dates in order to allow ample time for planning.	X			
Shared print programs start preparing for and addressing expiring commitments at least two years prior to the commitment expiration date.		X		
Shared print programs are able to provide commitment data to members regarding their expiring commitments.		X		
As expiration dates approach, shared print programs ask members to extend commitments, and if that is not possible, transfer the commitments to another member.		X		
The program considers circumstances that warrant extending or reducing the commitment periods for certain kinds of materials.			X	
The MOU or related Policy Guidelines document a process for extending the length of commitments in			X	

advance of expiration (See Best Practice for Retention Period and Survivability for suggestions on length of commitments to ensure survivability).				
The shared print program is able to provide commitment data that includes overlap analysis within the program to members regarding their expiring commitments.			X	
If a member is not able to extend a commitment or the program cannot transfer the commitment to another member, the program has established policies and practices for asking members to transfer the physical item to another member.			X	
If a commitment cannot be transferred within the same program, the shared print program seeks other shared print programs that could retain the item if it is not committed for retention by other programs.			X	
The shared print program requires members to update commitment data in local and national systems.			X	
The shared print program provides commitment data that includes overlap analysis within the program and other shared print programs to members regarding their expiring commitments to facilitate renewal of commitments.				X

Examples

- Maine Shared Collections Cooperative’s [Operating Policies](#) outline:
 “The MSCC Executive Committee will revisit the retention period at least once every five years to determine if circumstances warrant extending or reducing the commitment periods for certain kinds of materials. At the end of the 15-year retention period Members will determine whether to extend the commitments for a further 15-years.”
- Flowchart outlining one shared print program’s process for extending commitments:
