



Best Practices for Transfer of Retention Commitments

Policy

The Rosemont Shared Print Alliance aims to ensure the continued availability of all journal titles with retention commitments to a program that is a member of the Rosemont Shared Print Alliance. If a library is no longer able to retain a journal title or any part thereof for which they have made a retention commitment, the library will work through their shared print program and the Rosemont Alliance to reallocate the retention commitment or transfer the physical volumes to other participating libraries in the shared print program or the Rosemont Alliance. The Rosemont Alliance recommends using JRNL to identify and manage gaps and transfers.

Procedures

These Procedures are based on the [Best Practices for Transferring Commitments or Materials Updated December 2020](#) prepared by the Partnership for Shared Book Collections. They have been revised to reflect the Rosemont Alliance policies and procedures and differences between serials and monographs.

These practices are intended to address the following circumstances, and presume that all reasonable and/or possible efforts to retain commitments were made:

- A. Transfers of commitments or materials within a shared print program.
 - If after following local guidelines the title will be withdrawn, the library should seek to transfer the commitment according to the practices of their program. The library should seek either to transfer both the physical volume(s) comprising the title and the commitment, or the commitment alone, within the shared print program to another participating member willing to take either or both.
 - Duplication of the title across the two collections should be determined by comparing pieces to the corresponding bibliographic description at each library.
 - The library should seek first to transfer commitments to a member library within the same shared print program.
 - If no other library within a shared print program holds the title or is willing to take on the commitment, the library should seek to transfer the title to another shared print program (see B below).
 - Libraries are not required but are strongly encouraged to accept requests for transfer of a retention commitment.



- All libraries involved should update local, OCLC, PAPER, and any other records of commitments, according to current best practices.
- B. Transfers of commitments or materials between shared print programs or from other libraries.
- If no participating library in the same program is willing or able to take on a commitment, the program will inform the Rosemont Alliance Operations Committee for a decision on whether to transfer the volumes or the commitment to another participating library in the Rosemont Alliance.
 - The Operations Committee should seek either to transfer both the physical volume(s) comprising the title and the commitment, or the commitment alone, to another participating member willing to take either or both.
 - If the transfer is due to a library exiting a shared print program, please see [Best Practices for Exiting a Shared Print Program](#).
 - If the transfer is due to a library being closed or no longer able to retain a collection, a shared print program should consider organizing a way to accept these materials when possible.