



North: the Canadian Shared Print Network / Nord: Réseau canadien de conservation partagée des documents imprimés

Participant Agreement June 2022

North: the Canadian Shared Print Network/ Nord: Réseau canadien de conservation partagée des documents imprimés (hereafter referred to as North/Nord) is a national shared print network that coordinates the activities of existing regional shared print initiatives and provides a path to participation for other interested libraries not yet in a shared print program. This national program provides a means to consolidate print collections while ensuring long-term content retention and access for users. All categories of print (monographs, serials, government documents) will be considered, and the primary focus will be on Canadian materials.

1. Participation and governance

1.1 Participation: All libraries in Canada are eligible to participate in North/Nord. Signing of the Participant Agreement signifies Participation at the Program level; libraries have further flexibility to participate or not at the project level.

1.2 Term of commitment: In order to promote stability of the Network, participants agree to join for an initial five (5) year term. This Participant Agreement renews automatically every five years unless written notice of intention to withdraw from North/Nord is provided to the Steering Committee 12 months in advance of the renewal date.

1.3 Participant Agreement: Operations of North/Nord shall be governed by this Participant Agreement signed by all participating libraries. The Steering Committee will review this Agreement every 5 years, or as needed, to ensure that it is current and accurately reflects expectations, practices and standards. All amendments to the body of this Agreement must be in writing and executed by all Participants. If alterations to this Agreement are required for only one site, they must be approved by the Steering Committee and documented so that both parties are aware of the institution-specific changes. Suggestions for amendments to the Agreement may be submitted to the Steering Committee for consideration.

1.4 Participation types:

1.4a Archive Holders: Participants that commit to retain materials from their own holdings are known as Archive Holders.

1.4b Archive Builders: Participants that agree to have materials transferred into their library's collections specifically for retention purposes are known as Archive Builders. Once materials are transferred, the library becomes the Archive Holder for those titles. A

participant may choose to be an Archive Builder for specific projects only, and an Archive Holder for others.

1.4c Archive Supporters: Participants that support the stewardship of the scholarly record but cannot commit to retain physical materials locally are known as Archive Supporters. These participants may choose to transfer uniquely held materials within their collections to Archive Builders within the North/Nord participant group.

1.5 Steering Committee: This group oversees operation and development of the Network, works to integrate the Network with related archiving programs nationally and internationally, recommends solutions related to holdings disclosure and access/delivery, and develops the project program that will select titles for inclusion in the North/Nord archive.

1.6 Operations Working Groups (OWGs): Where warranted, OWGs will be established to guide the scoping and development of specific shared print projects. Membership in these groups will be drawn from Canadian library staff with subject matter expertise, or participants from other groups or communities as required. The OWGs will be chaired by members of the Steering Committee.

1.7 Administrative Host: Administrative Hosting is provided through the COPPUL Office. In consultation with the Steering Committee, the COPPUL Office manages flow-through finances for the Network as well as matters of employment related to the Network Coordinator and intern.

1.8 Program Evaluation: A formal assessment of the North/Nord network will be conducted starting in the Fall of 2023. This will help to improve processes and communications, demonstrate the relevance of the work, and aid in setting goals for future projects. Subsequent evaluations will be conducted every 5 years thereafter.

2. Archiving

2.1 Selection process: Decisions about which titles will be incorporated into the North/Nord shared print network and where they will be preserved are made based on project-specific analyses of participating libraries' holdings. Participants wishing to be involved in a particular project may be asked to share their holdings data with a third party for the purposes of conducting overlap studies. Materials identified for archiving may include monographs, serials, journals, maps, or other categories of physical library materials. Individual projects are identified, prioritized, and developed by either the Steering Committee or Operations Working Groups.

2.2 Retention period: Archive Holders/Archive Builders agree to maintain North/Nord committed titles for retention periods specific to each project. Each project will therefore have a 'Retention Date' identifying the end of the defined retention period. The Steering

Committee may modify retention dates if agreed upon by unanimous vote, and libraries will be informed of retention period extensions.

2.3 Ownership: Participants retain ownership of the materials for which they commit to being the Archive Holder. Materials which are relocated to an Archive Builder will become property of said Archive Builder, preferably through a gift process. Archive Holders/Archive Builders agree not to sell, discard, donate or otherwise relinquish ownership or control of any of the archived materials prior to the Retention Date, except to transfer materials to another North/Nord Archive Builder. Other exceptions may be approved by the Steering Committee.

2.4 Transferring holdings: Participants agree to use their best efforts to transfer physical materials in a timely manner from local collections to the nearest identified Archive Builder. Shipping costs are the responsibility of the transferring library.

2.5 Archiving facilities: The North/Nord shared print collection will be a distributed one with volumes maintained at the Archive Holder/Archive Builder libraries, either in library shelving or in library storage facilities at the library's discretion. North/Nord may make recommendations that rare or high risk material be moved to closed stack locations.

2.6 Original form: Archive Holders/Archive Builders agree to maintain all of the archived materials in their original, artifactual form whenever possible.

2.7 Review of Materials (validation): Archive Holders agree to examine all archived materials according to the requirements for the level of validation specified by the Steering Committee. Efforts will be made to design project parameters such that physical validation requirements are minimized.

2.8 Holdings disclosure: Archive Holders/Archive Builders will record North/Nord retention commitments in their local catalogues in an effort to prevent withdrawal of these volumes. Where possible, they will also disclose commitments in regional and national/international systems in ways that are consistent with emerging national or international standards. OCLC membership is not a requirement for participation in North/Nord. Specific metadata details will be developed and distributed for each shared print project.

2.9 Access to the materials: Archive Holders/Archive Builders agree to make the materials available to other institutions to which the Archive Holder/Archive Builder lends materials, in accordance with their Interlibrary Loan policies and procedures.

3. Costs

3.1 Absorbed Costs: North/Nord participants agree to be responsible for all of the costs and expenses associated with maintaining the materials, transferring holdings to other Archive Builders (including transportation costs), and deselecting materials from local collections.

4. Withdrawal

4.1 Withdrawal from future North/Nord work: Libraries have the flexibility to participate or not at the project level. At any time after completion of its first five years of participation, a participant may withdraw from North/Nord at the Program level by providing written notice to the Steering Committee at least twelve (12) months prior to its intended withdrawal date. The participant would then no longer be contacted regarding participation in upcoming projects. Libraries would still be expected to keep any retention commitments in place for the duration of the commitment period.

4.2 Withdrawal from completed North/Nord work: If an Archive Holder withdraws from North/Nord AND can no longer maintain the materials it has committed to retain, the Archive Holder agrees to offer the materials to the nearest Archive Builder and to transfer any accepted materials to the Builder at the original Holder's expense. The Steering Committee may waive this requirement if it determines that the materials no longer need to be archived.

North/Nord Participant Agreement - Signature Page

Name of Institution:

What role will your institution play within the North/Nord network? (Circle one)

Archive Builder & Holder / Archive Holder / Archive Supporter

Who will be the primary point of contact for North/Nord work at your institution? Please provide their name and contact information.

Name of Institutional Signatory:

Title of Signatory:

Signature:

Date:

North/Nord Signatory:

Signature:

Date: