

**Interim
Integrated Ocean Drilling Program
Sample, Data, and Obligations Policy**

1. Overview of the Policy

This document outlines the policy for distributing IODP samples and data to research scientists, curators, and educators. This document also defines the obligations that sample and data recipients incur.

The specific objectives of the IODP policy are to:

- ensure availability of samples and data to science party members so they can fulfill the objectives of the drilling project and their responsibilities to IODP;
- encourage scientific analyses over a wide range of research disciplines by providing samples to the scientific community;
- preserve core material as an archive for future description and observations, nondestructive analyses, and sampling; and
- disseminate scientific results from drilling project-related research.

2. Sample and Data Distribution

During the moratorium period, samples are available exclusively to the drilling project's "science party," which has been formally approved by IODP, whose requests have been approved by the Sample Allocation Committee (SAC; see Section 4 and Appendix A). Archived project data produced from sample analyses, downhole measurements in boreholes, and site surveys performed by IODP are available during the moratorium period to the entire science party.

The science party is defined as those scientists selected by IODP to produce initial, openly shared data associated with a particular drilling project within the moratorium period.

After the moratorium period ends, samples are given or loaned to persons whose requests have been approved by the IODP Curator (see Appendix A) in the following three categories:

- scientists who wish to conduct research on IODP materials and publish the results but who are not necessarily associated with a specific drilling project,
- curators of museums and collections, and
- educators.

After the moratorium period expires, project data are also publicly available.

3. Moratorium Period

The purpose of the moratorium period is to ensure that adequate time is allotted for science party members to conduct drilling project-related research before core samples and data are made available to the general scientific community. To accommodate the variability in duration of specific drilling projects, the period of one year after the release of samples or data to the science party is designated as the “moratorium period.” The release date, relative to the drilling project, may be delayed post-drilling or staggered during drilling as appropriate to the scientific objectives defined by IODP. Only members of the science party are permitted to receive core samples and associated data during the moratorium period. Other requests for samples are considered after the moratorium period expires.

4. Drilling Project Sampling Strategy

For each drilling project, a SAC is constituted, comprising the Co-Chief Scientist(s), the IODP Staff Scientist, and the IODP Curator (see Appendix A). During the drilling project, the IODP Curator’s authority and responsibilities to the SAC may be ceded to the drilling project Curatorial Representative.

The SAC establishes a project-specific sampling strategy and makes decisions on project-specific sample requests received before the drilling project, during the drilling project, and during (but not after) the moratorium period. Approval of such sample requests requires endorsement by a majority of the SAC members. In the event of an evenly divided vote, a decision is made by the IODP Curator. Appeals of this decision can be made to the Curatorial Advisory Board (CAB; see Section 5 and Appendix A).

5. IODP Review and Approval of Sample Requests

The CAB is a standing body that consists of two IODP senior managers and three members of the scientific community (selected by the IODP Scientific Measurements Panel), who will serve overlapping four-year terms (see Appendix A). Every effort will be made to ensure that CAB membership represents a variety of scientific disciplines.

The CAB has two main functions:

- It acts as an appeals board vested with the authority to make final decisions regarding sample distribution if and when conflicts or differences of opinion arise among any combination of the sample requester, IODP Curator, and the SAC.
- It reviews and approves requests to sample the permanent archive and requests for loans of core material for outreach and education.

6. Scientific Results Dissemination (Publications)

The responsibility and authority for making decisions on issues relating to the publication of drilling project-related research to fulfill IODP obligations lies with an Editorial Review Board (ERB) and the IODP manager responsible for publications.

An ERB is established for every drilling project and remains active for 30 months post-moratorium. The primary purpose of the ERB is to coordinate the writing of the drilling project results and monitor all post-project research and associated publication of results. The ERB comprises the Co-Chief Scientist(s) for the drilling project and the IODP Staff Scientist (see Appendix A). These individuals may select external scientists/specialists to serve with them on the board. The need for external ERB members will be determined based on the Co-Chiefs' and Staff Scientist's workloads and expertise.

7. Sample- and Data-Recipient Responsibilities

All science party members are obligated to conduct research and publish their results. Papers must be published in a peer-reviewed scientific journal or book that publishes in English or submit a progress report to IODP Management International, Inc., outlining the status of the samples and/or the data prior to the deadline for publication of results. In the event that research is discontinued, samples may have to be returned as per instructions from IODP Management International, Inc. Manuscripts for publication must be submitted within 20 months post-moratorium.

All scientists who receive samples or conduct nondestructive analyses after the moratorium period are obligated to publish a paper summarizing the results of their work in a peer-reviewed scientific journal or book that publishes in English or submit a progress report to IODP Management International, Inc., outlining the status of the samples and/or the data no later than 36 months after receiving them. In the event that research is discontinued, samples may have to be returned as per instructions from IODP Management International, Inc.

All publications must include "IODP" in the title, abstract, or as a formal keyword and explicitly acknowledge IODP. All publications must be sent to IODP Management International, Inc., Sapporo Office, along with applicable data (see Appendix A).

Those scientists not meeting the above obligations will be restricted from obtaining future samples and data and may not be allowed to participate in future drilling projects. Obligations incurred during the Ocean Drilling Program (ODP) will be carried forward into IODP.

Appendix A: Contact Information—Curatorial Advisory Board, Policy Overseers, and IODP Representatives

Title	Name	Contact Information
Sample Allocation Committee (SAC)	For each drilling project, this committee comprises the Co-Chief Scientist(s), IODP Staff Scientist, and IODP Curator.	Contact information for the Co-Chief Scientist(s) and Staff Scientist of each drilling project can be found in the Scientific Prospectus or the list of Shipboard Participants in the <i>Preliminary Report</i> (http://www.iodp.org). See below for IODP Curator contact information.
IODP Curator: U.S. Repositories (Texas A&M University Scripps Institution of Oceanography; Columbia University)	Dr. John Firth	E-mail: firth@iodp.tamu.edu Phone: 001 979 845 0507 Fax: 001 979 845 1303 Mailing address: Integrated Ocean Drilling Program 1000 Discovery Drive College Station TX 77845, USA
IODP Curator: European Repository (Bremen University)	Dr. Ursula Röhl	E-mail: uroehl@marum.de Phone: 49 421 218 2482 Fax: 49 421 218 3116 Mailing address: ESO Curation Manager, Research Center for Ocean Margins (RCOM) Geosciences Department Bremen University Postfach 33 04 40 28334 Bremen, Germany
IODP Curator: Japanese Repository (Kochi University)	Dr. Kazuho Fujine	E-mail: Fujinek@jamstec.go.jp Phone: 81 46 867 9295 Fax: 81 46 867 9255 Mailing address: Center for Deep Earth Exploration (CDEX) Japan Agency for Marine-Earth Science and Technology (JAMSTEC) 2-15 Natsushima-cho Yokosuka 237-0061, Japan
Curatorial Advisory Board (CAB)	Dr. Hans Christian Larsen, Vice President of Science Planning IODP Management International, Inc.	E-mail: larsenhc@cris.hokudai.ac.jp Phone: 81 11 738 1075/3506 (direct) Fax: 81 11 738 3520 Mailing address: IODP Management International, Inc. Rm. 05-101, CRIS Hokkaido University, N21, W10 Sapporo 001-0021, Japan
	Dr. Thomas Janecek, Vice President of Operations IODP Management International, Inc.	E-mail: tjanecek@iodp.org Phone: 001 202 659 4234 Fax: 001 202 467 6945 Mailing address: IODP Management International, Inc. 1899 L Street NW, Suite 200 Washington DC 20036, USA

	Dr. Kenji Nanba	E-mail: nanba@aujaghi.fs.a.u-tokyo.ac.jp Phone: 81 3 5841 5310 Fax: 81 3 5841 5308 Mailing address: Graduate School of Agricultural and Life Sciences Tokyo University 1-1-1, Yayoi, Bunkyo-Ku Tokyo 113-0032, Japan
	Dr. Clive Neal	E-mail: neal.1@nd.edu Phone: 001 574 631 8328 Fax: 001 574 631 9236 Mailing address: Department of Civil Engineering & Geological Sciences 156 Fitzpatrick Hall University of Notre Dame Notre Dame IN 46556, USA
	Dr. Heinrich Villinger	E-mail: vill@uni-bremen.de Phone: 49 421 218 4509 Fax: 49 421 218 6173 Mailing address: FB Geowissenschaften Universität Bremen Postfach 330 440 D-28334 Bremen, Germany
Editorial Review Board (ERB)	For each drilling project, this committee comprises the Co-Chief Scientist(s), IODP Staff Scientist, and one external scientist (optional).	Contact information for the Co-Chief Scientist(s) and Staff Scientist of each project can be found in the <i>Scientific Prospectus</i> or the list of Shipboard Participants in the <i>Preliminary Report</i> (http://www.iodp.org).
Scientific Measurements Panel	Co-chairs: Dr. Makoto Okada Dr. Mike Lovell (pending SPC approval)	M. Okada: E-mail: okada@mx.ibaraki.ac.jp Phone: 81 29 228 8392 Fax: 81 29 228 8405 Mailing address: Department of Environmental Sciences Ibaraki University Bunkyo 2-1-1, Mito Ibaraki 310-8512, Japan M. Lovell: E-mail: mike.lovell@le.ac.uk Phone: 44 116 252 3933 Fax: 44 116 252 3918 Mailing address: Geology Department University of Leicester Leicester LE1 7RH, UK A complete panel member list and e-mail links can be found at: http://www.isas-office.jp/panel/scimp.html