

ODP Sample Distribution, Data Distribution, and Publications Policy

(Adopted March 1999; revised 1 June 2001, 15 April 2002, 19 August 2002)¹

This document outlines the policy and the procedures for distributing samples and data from the Ocean Drilling Program (ODP) and the Deep Sea Drilling Project (DSDP) to research scientists, curators, and educators. It also describes the associated obligations that sample and data recipients incur.

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¹This policy replaces the ODP Publications Policy (dated 16 July 1996; amended 12 February 1997) and the ODP Sample Distribution Policy (dated 1 July 1998). In addition to policy revisions, periodically administrative updates are made to this document to keep the policy current (such as updates to Appendix C: Contact Information) and to clarify existing policy guidelines. For a complete list of the specific policy revisions and administrative updates that have been made to this document, see [Appendix H](#).

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1. Introduction

The Ocean Drilling Program (ODP) is an international geoscience program that collects and analyzes marine cores of rocks and sediments recovered from the seafloor by the research vessel *JOIDES Resolution*. Three repositories in the United States (Texas A&M University, Lamont-Doherty Earth Observatory [LDEO]/Columbia University, and University of California at San Diego) and one in Germany (Bremen University) house the ODP cores, as well as those from the Deep Sea Drilling Project (DSDP). Shipboard samples and residues, thin sections, and smear slides also reside in these repositories. Core photographs, handwritten data sheets, and electronic core analysis data are curated at the Texas A&M University location. Downhole logging data is managed by the Borehole Research Group at LDEO.

Everyone who sails as an invited participant on an ODP cruise and anyone who obtains samples after a cruise incurs obligations to ODP as defined in this policy. These obligations are fulfilled by conducting research and publishing the results, and by providing ODP with associated data. If the procedures outlined in this policy are not met, recipients will be restricted from obtaining future samples and may not be allowed to participate in future cruise legs.

2. Overview of Policy

This document outlines the policy and procedures for distributing ODP and DSDP 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 ODP policy are to:

- ensure availability of samples and data to scientific party members so they can fulfill the objectives of the drilling leg and their responsibilities to ODP;
- 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, for nondestructive analyses, and for sampling; and
- disseminate scientific results from postcruise research.

2.1. Sample Distribution

ODP and DSDP samples are generally distributed for research projects that can be completed within two to three years. Samples are given or loaned to persons in the following four categories:

- scientists who participate on specific drilling legs as shipboard or shore-based members of a “scientific party” that has been formally approved by ODP, and whose requests have been approved by the Sample Allocation Committee (SAC);
- scientists who wish to conduct research on ODP or DSDP materials and to publish the results, but who are not necessarily associated with a specific leg;
- curators of museums and collections; and
- educators.

See [Section 4](#) and [Section 5](#) for details about the individual requirements associated with receiving samples in each of these categories.

Within the “moratorium” of each leg, which extends from the time the leg begins (i.e., the ship sails) to 12 months after it ends (i.e., the ship returns to port), only members of the scientific party (including approved shore-based researchers) are permitted to receive core samples and associated data (see [Section 4](#)). Sample requests from scientists not formally associated with the scientific party will be considered after the moratorium has expired (see [Section 5](#)).

2.2. Data Distribution

Data produced from samples taken for routine shipboard analyses are available during the moratorium to the entire shipboard party and to approved shore-based participants. After the moratorium expires, all cruise data are made available to everyone. Data from all DSDP and ODP cruises are available from the ODP Data Librarian. Data from ODP Leg 171B and beyond are also available on the ODP World Wide Web site at <http://www-odp.tamu.edu/database/>, or from the ODP Data Librarian.

2.3. Publication Distribution

At the end of each drilling leg, ODP publishes a set of two volumes known as the *Proceedings of the Ocean Drilling Program*, which consist of an *Initial Reports* volume and a *Scientific Results* volume.

The *Initial Reports* volume is prepared by the shipboard scientific party and contains the scientific and engineering results from each ODP leg. This volume is distributed approximately one year postcruise.

The *Scientific Results* volume contains peer-reviewed papers, prepared by scientific party members, that present the results of their postcruise scientific research from an ODP leg. Upon acceptance and revision, *Scientific Results* volume papers are processed for publication on the ODP Web site (<http://www-odp.tamu.edu/publications/>). The *Scientific Results* volume contents are published on CD-ROM four years postcruise. A printed hardcover book is produced with the *Scientific Results* CD-ROM at the same time. The book contains the table of contents for the entire *Scientific Results* volume and a synthesis paper that summarizes the postcruise research related to the leg. The CD-ROM is also sold separately. All publications are available from the ODP Distribution Center (distribution@odpemail.tamu.edu). Publications beginning with *Initial Reports* Volume 166 and *Scientific Results* Volume 152 are also available on the ODP Web site at <http://www-odp.tamu.edu/publications/>.

To fulfill their obligations to ODP, scientists are given the option of publishing their postcruise results in either the *Scientific Results* volume, or in an appropriate peer-reviewed scientific journal or book that publishes in English. See [Section 4.4](#), or [Section 5.1.c](#)., and [Appendix A](#), for details on the steps to follow in order to fulfill the ODP obligations.

3. Program Responsibilities

3.1. Curatorial Responsibilities

The responsibility and authority for making decisions regarding the distribution of ODP and DSDP samples, as per this policy, lies with the Sample Allocation Committee (SAC), the Curatorial Advisory Board (CAB), and the ODP Curator.

3.1.a. Sample Allocation Committee (SAC)

For each drilling leg, a SAC is constituted, comprised of the Co-Chief Scientists, the ODP Staff Scientist, and the ODP Curator. During the leg, the Curator's authority and responsibilities to the SAC may be ceded to the shipboard Curatorial Representative.

Because the SAC best understands the scientific needs of their leg, this group establishes a leg-specific sampling strategy and makes decisions on leg-specific sample requests received before the leg sails, during the leg, and within (but not after) the moratorium. Approval of such sample requests requires endorsement by a majority of the SAC. In the event of an evenly divided vote, the ODP Curator will make a decision. If he or she wishes to do so, the sample requester may choose to appeal the SAC's decision to the CAB.

3.1.b. Curatorial Advisory Board (CAB)

The CAB is a standing body that consists of the ODP Deputy Director, the ODP Science Services Manager, and two members of the scientific community (selected by the JOIDES Scientific Measurements Panel) who will serve four-year terms that overlap by two years. 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, ODP Curator, and the SAC. In the case of an equally split vote among the four CAB members, a decision will be made by the JOI Office.
- It reviews and approves requests to sample the "permanent archive" and requests for loans of core material for public display (see [Appendix B](#)). To ensure prompt decisions, CAB members will communicate via teleconferencing or e-mail. The existing CAB members are listed in [Appendix C](#).

A person appealing to the CAB may contact any member of the Board directly (see [Appendix C](#)).

3.1.c. ODP Curator

The ODP Curator maintains a record of all distributed samples, both on board the ship and from the repositories. This record includes the names of the recipients, the nature of the proposed research, the volume of samples taken, and the status of the request. This information is available to investigators upon request, either through the ODP Curator, or the ODP Database Group.

3.2. Publication Responsibilities

The responsibility and authority for making decisions regarding the publication of postcruise research to fulfill the ODP obligations, as per this policy, lies with the Editorial Review Board (ERB) for each leg and the ODP Publication Services Manager.

3.2.a. Editorial Review Board (ERB)

An ERB is established for every leg and remains active for 42 months postcruise. The primary purpose of the ERB is to maintain an independent and effective peer-review system for the publication of leg results. The Board is comprised of the Co-Chief Scientist(s) for the leg and the ODP Staff Scientist. These individuals may select external scientists/specialists to serve with them on the board. The need for external ERB members will be determined on a leg-by-leg basis, based on the Co-Chiefs' and Staff Scientist's workloads and expertise.

The ERB members' responsibilities include the following.

The Co-Chief Scientist(s) will:

- coordinate the writing of the *Initial Reports* volume materials, attend the postcruise meeting, and review the *Initial Reports* volume galleys; and
- write or coordinate a Leg Synthesis paper to be published in the *Scientific Results* volume.

The ODP Staff Scientist will:

- coordinate the writing of the *Initial Reports* volume materials, attend the postcruise meeting, and review the *Initial Reports* volume galleys;
- ensure that all *Scientific Results* manuscripts are complete and of reviewable quality before they are sent out for review. Manuscripts that do not meet ODP's standards will be returned to the author and will not go through the review process unless they are revised to meet ODP standards before the submission deadline;
- document the status of the scientific party members' actions to fulfill their obligations requirements; and
- coordinate the handling of additional contributions to the *Scientific Results* volume after 42 months postcruise.

The entire ERB will:

- review all proposed publication titles related to the leg (*Scientific Results* volume, journal, or book), approve all papers that fulfill ODP obligations, and approve the final table of contents for the *Scientific Results* volume;
- review each journal or book manuscript submission, within three months of receipt, for proper citation of site summaries and site chapters and for proper use of data and conclusions from other members of the scientific party;
- coordinate the peer-review process for each *Scientific Results* manuscript as soon as the Staff Scientist approves each paper as being of "reviewable quality," collect *Scientific Results* manuscript reviews, and make the final decision on manuscript acceptance or rejection; and

- regularly update the leg-related citations list published on the ODP Web site (<http://www-odp.tamu.edu/publications/>).

4. Requester Responsibilities—Moratorium Sampling

4.1. Leg-Specific Sampling Strategy

Leg-specific sampling, for both shipboard and shore-based requests, will follow the Sampling Strategy (see [Appendix D](#)) established by the SAC. The strategy will integrate and coordinate the programs for drilling, sampling, and downhole measurement to best meet scientific needs. By necessity, the strategy will evolve over the course of leg planning and operations, and during the postcruise moratorium. All sampling plans will be carefully considered in the strategy.

Whenever possible, sampling should be deferred to a coordinated shore-based sampling effort (commonly referred to as a “sampling party”) in order to sample more efficiently, and with the perspective gained from having completed the leg. This will ensure the best possible use of the core and distribution of samples. Shore-based sampling will be particularly appropriate for legs where many samples will be needed, such as those focusing on paleoceanographic objectives. Travel funds have been specifically allocated for this purpose by some ODP member countries.

4.2. Requests from Scientific Party Members

Only scientific party members can receive samples and data during the moratorium period.

4.2.a. Requests for Samples

Scientific party members are asked to submit sample requests to the ODP Curator three months prior to the start of the leg (for contact information see [Appendix C](#)). This will provide sufficient lead time for planning. Sample requests submitted during a leg or during the moratorium will also be considered.

See [Appendix E](#) for information on how to obtain the ODP Sample Request Form. [Appendix F](#) contains guidelines to assist the requester in estimating sample volumes.

The SAC will review the sample requests, and approval will be based on compatibility with the Sampling Strategy. Sample requests are approved if a majority of the SAC endorses the requests. In cases where a sample request is considered incompatible, the SAC may: (1) recommend modifications to the request, (2) modify the Sampling Strategy, or (3) reject the request if the other options are inappropriate. In the event of an evenly divided vote, the ODP Curator will make a decision. If he or she wishes, the sample requester may choose to appeal any decision to the CAB. If a conflict arises over the allocation of samples, shipboard scientific party members have priority over shore-based members.

4.2.b. Requests for Data

Data produced from samples taken for routine shipboard analyses (e.g., index properties, interstitial [pore] water whole rounds, thin sections, smear slides, X-ray diffraction and

X-ray fluorescence samples, paleontology core-catcher samples) are available to the entire shipboard party and to approved shore-based participants during the moratorium. Data from Legs 171B and beyond are available on the ODP Web site at <http://www-odp.tamu.edu/database/>. During the moratorium, the data is password protected and can only be accessed by members of the scientific party. Individuals who cannot easily access the Web may submit data requests to the ODP Data Librarian (for contact information see [Appendix C](#)).

4.3. Samples for Routine Shipboard Analyses

Unless requested, samples used for routine shipboard analyses, and/or their residues, are shipped to the appropriate core repository at the end of the cruise. If scientific party members want these materials for postcruise research, they are available through the normal sample request procedure (see [Section 4.2.a.](#) and [Appendix E](#)). Thin sections and smear slides prepared during a cruise are archived at the repository where the core from that leg is stored and are available for short-term (less than one year) loan to scientific party members upon request through the regular sample request procedures.

4.4. Sample- and Data-Recipient Responsibilities²

This section details the ODP obligation fulfillment requirements associated with this policy. See [Appendix A](#) for a checklist of all obligation fulfillment requirements.

4.4.a. Fulfillment of ODP Obligations

All scientific party members who sail as invited participants on ODP cruises, and all shore-based participants who are included in the scientific party, incur obligations to ODP that they must fulfill by using samples or data from the leg they participated in to conduct postcruise research and by publishing associated results in agreement with the other terms of this policy. If a scientific party member is unable to produce research results because appropriate sample or data were not retrieved during the cruise, or because data could not be obtained during postcruise analyses, a letter of explanation must be submitted to the ODP Publications Coordinator. The letter of explanation will be copied by the Publications Coordinator to the ODP Staff Scientist on the ERB for that leg, the ODP Publication Services Manager, and the ODP Curator for review and comment. If necessary, individual letters of explanation may be copied to the JOI Office for appropriate action. Failure to meet these obligations will result in the rejection of future sample requests and may influence participation on future legs.

4.4.b. Publishing within the Moratorium²

Authors who wish to submit manuscripts (to the *Scientific Results* volume, journals, or books) before the moratorium has expired must comply with the guidelines in this section.³

²Policy revision made June 2001. See [Appendix H.1.a.](#) for details.

³Policy update made December 2001. See [Appendix H.2.b.](#) for details.

4.4.b.i. All scientific party members shall:

- Receive prior approval in writing by a majority of the scientific party. This approval must be coordinated by the ODP Staff Scientist, who will circulate the manuscript among the scientific party, tabulate responses, and notify the author of the scientific party's decision.
- Comply with all written collaborative agreements identified in the leg-sampling plan.⁴
- Use the authorship "Leg #### Scientific Party" (where #### is the leg number). Any exceptions must be cleared through the ODP Publication Services Manager before the time of submission.
- Publish:
 - (a) a paper in a peer-reviewed scientific journal or book that is published in English, or
 - (b) a paper or a data report in the *Scientific Results* volume.⁴
- Acknowledge ODP in all publications that result from the data collected from ODP samples using the following wording.⁵

This research used samples and/or data provided by the Ocean Drilling Program (ODP). ODP is sponsored by the U.S. National Science Foundation (NSF) and participating countries under management of Joint Oceanographic Institutions (JOI), Inc. Funding for this research was provided by _____.

- Include the words "Ocean Drilling Program," "*JOIDES Resolution*," "Leg ####," and/or "Site ####" (where #### is the leg or site number) as key words provided to the journal or book publisher of the manuscript. (This will allow the legacy of ODP to be tracked by bibliographic databases such as GeoRef.)⁵
- Submit one electronic copy (<http://www-odp.tamu.edu/publications/submit/>) or four paper copies of each manuscript to the ODP Publications Coordinator at the time the submission is sent to the journal or book.⁶ The manuscript will be distributed to the ERB, who are responsible for reviewing each manuscript for proper citation of site summaries and site chapters and for proper use of data and conclusions from other members of the scientific party.
- If a paper is accepted for publication by a journal or book publisher, then the author must:
 - (a) submit an electronic copy of the citation, abstract, and keyword list to the ODP Publications Coordinator, and
 - (b) send one reprint to the ODP Curator in either print format or PDF (<http://www-odp.tamu.edu/publications/submit/>).⁶
- If a paper is rejected by a journal or book publisher, then the author must contribute a manuscript or data report⁷ to the *Scientific Results* volume no later

⁴Policy update made February 2003. See [Appendix H.2.i.](#) for details.

⁵Policy revision made June 2001. See [Appendix H.1.c.](#) for details.

⁶Policy revision made August 2002. See [Appendix H.1.f.](#) for details.

⁷A "paper" presents the results of extensive research on aspects of scientific drilling related to the leg. It is complete and contains scientific interpretation of the data that was generated in the research supporting the manuscript. A "data report" is a short report of useful data that mainly consists of data sets and does not contain interpretation of results. (Policy update made October 2002. See [Appendix H.2.e.](#))

than six months after receiving the rejection notice. (See [Section 4.4.c.iii.](#))

- Provide the ODP Publications Coordinator with updates on the status of each publication so that the leg-related citations list published on the ODP Web site can be updated (<http://www-odp.tamu.edu/publications/>).
- Submit, at the second postcruise meeting, final titles to the ERB for all papers that fulfill their ODP obligations and any supplementary publications that they plan to publish.⁸
- Complete the Postcruise Data Availability Form (see Appendix G) and submit it to the ODP Data Librarian (for contact information see Appendix C).⁸
- Return all unused samples to the appropriate core repository no later than five years postcruise. Residues from processed samples need not be returned.⁸

Note: Investigators may have other data obligations under the U.S. National Science Foundation’s Ocean Science Data Policy or under relevant policies of other funding agencies that require submission of data to national data centers.⁸

4.4.c. Publishing after the Moratorium

All scientific party members who incur obligations to ODP must comply with the following guidelines. Details of these obligations are presented below. (Also see [Appendix A](#) for a checklist of the obligations that must be fulfilled by scientists as defined in this policy.)

4.4.c.i. All scientific party members shall:

- Comply with all written collaborative agreements identified in the leg-sampling plan.
- Submit, at the second postcruise meeting, final titles to the ERB for all papers that fulfill their ODP obligations and any supplementary publications that they plan to publish.
- Submit all manuscripts by 28 months postcruise.
- Publish:
 - (a) a paper in a peer-reviewed scientific journal or book that is published in English, or
 - (b) a paper or a data report in the *Scientific Results* volume.
- Acknowledge ODP in all publications that result from the data collected from ODP samples, using the following wording.⁹

This research used samples and/or data provided by the Ocean Drilling Program (ODP). ODP is sponsored by the U.S. National Science Foundation (NSF) and participating countries under management of Joint Oceanographic Institutions (JOI), Inc. Funding for this research was provided by _____.

- Include the words “Ocean Drilling Program,” “*JOIDES Resolution*,” “Leg ###,” and/or “Site ###” (where ### is the leg or site number) as key words provided to the journal or book publisher of the manuscript. (This will allow the legacy of ODP to be tracked by bibliographic databases such as GeoRef.)⁹

⁸Policy update made February 2003. See [Appendix H.2.i.](#) for details.

⁹Policy revision made June 2001. See [Appendix H.1.c.](#) for details.

- Submit one reprinted copy of all published works derived from ODP samples or data to the ODP Curator in either print format or PDF (<http://www-odp.tamu.edu/publications/submit/>).¹⁰
- Complete the Postcruise Data Availability Form (see [Appendix G](#)) and submit it to the ODP Data Librarian (for contact information see [Appendix C](#)).¹¹
- Return all unused samples to the appropriate core repository no later than five years postcruise. Residues from processed samples need not be returned.

Note: Investigators may have other data obligations under the U.S. National Science Foundation's Ocean Science Data Policy or under relevant policies of other funding agencies that require submission of data to national data centers.

4.4.c.ii. Authors who choose to fulfill their ODP publication obligations by submitting a paper to a journal or book must also complete the following actions:

- Submit, at the time of submission to the journal or book, one electronic copy (<http://www-odp.tamu.edu/publications/submit/>) or five paper copies of each paper to the ODP Publications Coordinator.¹⁰

The ERB will check each manuscript within three months of receipt for proper citation of the *Initial Reports* volume and use of data and conclusions from other members of the scientific party. If the ERB determines that there is improper usage of the data and conclusions of other members of the scientific party, or failure to properly cite the *Initial Reports* volume, the ERB will contact the author, and when necessary the journal or book editor, with a recommendation that the manuscript be withdrawn or suitably modified. The ODP Publication Services Manager and the CAB will address any disputes arising from this activity.

- Provide the ODP Publications Coordinator with updates on the status of each publication so that the leg-related citations list published on the ODP Web site can be updated (<http://www-odp.tamu.edu/publications/>).
- If a paper is accepted for publication by a journal or book publisher, then the author must:
 - (a) submit an electronic copy of the citation, abstract, and keyword list to the ODP Publications Coordinator, and
 - (b) send one reprint to the ODP Curator in either print format or PDF (<http://www-odp.tamu.edu/publications/submit/>).¹⁰
- If a paper is rejected by a journal or book publisher, then the author must contribute a manuscript or data report to the *Scientific Results* volume no later than six months after receiving the rejection notice. (See [Section 4.4.c.iii.](#))

¹⁰Policy revision made August 2002. See [Appendix H.1.f.](#) for details.

¹¹Policy revision made April 2002. See [Appendix H.1.d.](#) and [Appendix H.1.e.](#) for details.

4.4.c.iii. Authors who choose to fulfill their ODP publication obligations by submitting a paper to the *Scientific Results* volume must also complete the following actions:

- Papers may be submitted to the *Scientific Results* volume for peer review between 13 and 28 months postcruise. All submissions must be in by the ODP deadlines (see [Appendix A](#); or specific manuscript submissions deadlines for each leg may be found in the “Publication Instructions for ODP Scientists” guide <http://www-odp.tamu.edu/publications/guide/DEADLN.HTML>).¹²
- The author must submit one electronic copy (<http://www-odp.tamu.edu/publications/submit/>) or seven paper copies of each paper to the ODP Publications Coordinator.¹³
- Submissions must be of reviewable quality and meet ODP’s standards as outlined in the “Publication Instructions for ODP Scientists” guide (<http://www-odp.tamu.edu/publications/CONTRIB.HTML>). Manuscripts that do not meet ODP’s standards will be returned to the author and will not go through the review process unless they are revised to meet ODP’s standards before the submission deadline (see [Appendix A](#); or specific manuscript submissions deadlines for each leg may be found in the “Publication Instructions for ODP Scientists” guide <http://www-odp.tamu.edu/publications/guide/DEADLN.HTML>).¹²
- The deadlines for submissions to the *Scientific Results* volume are:
Papers and Data Reports:
 Initial submission: 28 months postcruise
 Revised submission: 34 months postcruise
Synthesis Papers:
 Initial submission: 35 months postcruise
 Revised submission: 40 months postcruise
Specific manuscript submissions deadlines are given for each leg in the “Publication Instructions for ODP Scientists” guide (<http://www-odp.tamu.edu/publications/guide/DEADLN.HTML>).¹⁴

5. Requester Responsibilities—Postmoratorium Sampling

5.1. Scientific Sampling

5.1.a. Sample Request Procedures

Beginning 12 months after a cruise has ended, samples will be provided to any scientist, curator, or educator who has the resources to complete a scientific investigation, or who can prepare materials for curatorial or educational purposes. Requests for samples should be submitted using the ODP Sample Request Form (see [Appendix E](#)) to the ODP Curator.

¹²Policy update made February 2003. See [Appendix H.2.j](#) for details.

¹³Policy revision made August 2002. See [Appendix H.1.f](#) for details.

¹⁴Policy update made October 2002. See [Appendix H.2.f](#) for details.

The ODP Curator and the CAB supervise postmoratorium sampling. The ODP Curator will receive postmoratorium sample requests and will evaluate them for completeness and for adherence to the provisions in this policy. If questions arise, the ODP Curator will consult with the requester.

When considering a sample request, the ODP Curator will ascertain whether the requested material is available in the working half or the temporary archive half of the core (see [Appendix B](#) for definitions). If the material is unavailable, the ODP Curator will consult with the requester to determine if the range of the requested interval(s) or the sample spacing within the interval(s) can be modified. If the request cannot be modified because of scientific requirements, a request to sample the permanent archive will be considered.

Approval of sample requests will be based on the availability of material and the length of time it will take the investigator to complete the proposed project. Typical studies will take two to three years, but a study of longer duration will be considered under certain circumstances. If a sample requester disagrees with the ODP Curator's final decision on a sample request, the sample requester may choose to appeal any decision to the CAB.

To assist the sample requester, the ODP Curator will provide, upon request, relevant information about previous sample requests and resultant studies on the core interval in question. The ODP Curator will also provide advice and guidance to the requester when considering sample volumes and frequencies (see [Appendix F](#)).

The sample requester should secure funds independently for sample-related research activities.

5.1.b. Sampling the Permanent Archive

Requests to sample archive material should be sent to the ODP Curator, who will forward them to the CAB after preliminary review. The CAB will evaluate the request based on its scientific merit and on the extent to which the working half is depleted. If necessary, the CAB may also consult with members of the original SAC who established the permanent archive being considered for sampling. The CAB will strive to maintain a representative continuous section of core material for archival purposes whenever possible.

5.1.c. Sample-Recipient Responsibilities

5.1.c.i. Requests for samples

This section details the ODP obligations incurred by scientists who receive samples or conduct analyses after the 12-month moratorium, according to the terms of this policy.

All scientists who receive samples or conduct nondestructive analyses from ODP or DSDP cores after the 12-month moratorium are required to:

- Publish a paper in a peer-reviewed scientific journal or book that publishes in English, or submit a progress report to the ODP Curator outlining the status of the samples and/or the data no later than 36 months after receiving them.

- Acknowledge ODP, DSDP, and/or others as appropriate, in all publications that result from the data collected from ODP or DSDP samples using the following wording.¹⁵

This research used samples and/or data provided by the Ocean Drilling Program (ODP). ODP is sponsored by the U.S. National Science Foundation (NSF) and participating countries under management of Joint Oceanographic Institutions (JOI), Inc. Funding for this research was provided by _____.

- Include the words “Ocean Drilling Program,” “*JOIDES Resolution*,” “Leg ###,” and/or “Site ###” (where ### is the leg or site number) as key words provided to the journal or book publisher of the manuscript. (This will allow the legacy of ODP to be tracked by bibliographic databases such as GeoRef.)¹⁵
- Submit one reprinted copy of all published works derived from the samples or data to the ODP Curator in either print format or PDF (<http://www-odp.tamu.edu/publications/submit/>).¹⁶
- Complete the Postcruise Data Availability Form (see [Appendix G](#)) and submit it to the ODP Data Librarian (for contact information see [Appendix C](#)).¹⁷
- Return all unused samples to the appropriate core repository no later than five years postcruise. Residues from processed samples need not be returned.
- Provide the ODP Publications Coordinator with updates on the status of each publication so that the leg-related citations list published on the ODP Web site can be updated (<http://www-odp.tamu.edu/publications/>).
- If the sample recipient is unable to produce research results because data could not be obtained during postcruise analyses, a letter of explanation must be submitted to the ODP Curator.

Failure to meet the ODP obligations will result in the rejection of future sample requests and may influence participation on future legs.

Note: Investigators should be aware that they might have other data obligations under the U.S. National Science Foundation’s Ocean Science Data Policy or under relevant policies of other funding agencies that require submission of data to national data centers.

5.1.c.ii. Requests for data

Data produced from samples taken for routine shipboard analyses (e.g., index properties, interstitial [pore] water whole rounds, thin sections, smear slides, X-ray diffraction and X-ray fluorescence samples, paleontology core-catcher samples) are available after the moratorium has ended (after 12 months postcruise). Data from Legs 171B and beyond are made available on the ODP Web site at <http://www-odp.tamu.edu/database/>. Individuals who cannot access the Web may submit data requests to the ODP Data Librarian (for contact information see [Appendix C](#)).

Individuals who request to use ODP or DSDP data after the moratorium period has expired do not incur the same obligations to publish their results as do shipboard party

¹⁵Policy revision made June 2001. See [Appendix H.1.c.](#) for details.

¹⁶Policy revision made August 2002. See [Appendix H.1.f.](#) for details.

¹⁷Policy revision made April 2002. See [Appendix H.1.d.](#) and [Appendix H.1.e.](#) for details.

members during the moratorium; however, if they do publish papers based on these data, they are required to:

- Acknowledge ODP, DSDP, and/or others as appropriate in all publications that result from the data collected from ODP or DSDP samples, using the following wording.¹⁸

This research used samples and/or data provided by the Ocean Drilling Program (ODP). ODP is sponsored by the U.S. National Science Foundation (NSF) and participating countries under management of Joint Oceanographic Institutions (JOI), Inc. Funding for this research was provided by _____.

- Include the words “Ocean Drilling Program,” “*JOIDES Resolution*,” “Leg ###,” and/or “Site ###” (where ### is the leg or site number) as key words provided to the journal or book publisher of the manuscript. (This will allow the legacy of ODP to be tracked by bibliographic databases such as GeoRef.)¹⁸
- Submit one reprinted copy of all published works derived from the data to the ODP Curator in either print format or PDF (<http://www-odp.tamu.edu/publications/submit/>).¹⁹
- Complete the Postcruise Data Availability Form (see [Appendix G](#)) and submit it to the ODP Data Librarian (for contact information see [Appendix C](#)).²⁰
- Provide the ODP Publications Coordinator with updates on the status of each publication so that the leg-related citations list published on the ODP Web site can be updated (<http://www-odp.tamu.edu/publications/>).

5.2. Requests for Educational Material

Cores can be viewed, described, and sampled for teaching and educational purposes. Core materials that are abundant in the collection, and thus not in demand for research purposes, are available to educators for sampling.

Sample requests must be made using the Sample Request Form (see [Appendix E](#)). The ODP Curator will approve requests if they do not deplete the working and/or the temporary archive halves of the core (see [Appendix B](#) for definitions).

Educators who receive samples or conduct nondestructive analyses do not incur the same obligations as researchers to publish or provide data to ODP.

5.3. Requests for Public Display Material

Core material is available for public display, such as in museums or at professional scientific meetings. Requests to borrow cores may be submitted to the ODP Curator (for contact information see [Appendix C](#)).

Requests should:

- include a description of the public display, including the location and purpose;
- indicate the duration of the display and how the curatorial state of the cores will be maintained; and

¹⁸Policy revision made June 2001. See [Appendix H.1.c](#). for details.

¹⁹Policy revision made August 2002. See [Appendix H.1.f](#). for details.

²⁰Policy revision made April 2002. See [Appendix H.1.d](#). and [Appendix H.1.e](#). for details.

- identify the person(s) responsible for overseeing the cores.

Requests will be reviewed by the ODP Curator, and possibly the CAB, and will be forwarded to the JOI Office for final approval as appropriate. A loan agreement will be required for long-term loans (two weeks or more). The Curator will provide details about the loan agreement upon request.

All public displays of ODP/DSDP material will include a notice that properly credits ODP and support by the National Science Foundation and its international partners.

Appendix A: Checklists for Fulfilling ODP Obligations²¹

The following lists summarize the steps that investigators must follow in order to fulfill their obligations to ODP. Failure to meet all of these responsibilities will result in the rejection of future sample requests and may influence participation on future legs.

A.1. Guidelines for investigators who receive samples or data within the 12-month moratorium²²

A.1.a. Terms of the policy that apply to all scientific party members²³

	Policy term	Notes
1.	All scientific party members who sail as invited participants on ODP cruises and all shore-based participants who are included in the scientific party incur obligations to ODP that must be fulfilled by using samples or data from the leg they participated in to conduct postcruise research and by publishing associated results in agreement with the other terms of this policy.	Papers must be published in (a) a peer-reviewed scientific journal or book that publishes in English, or (b) the <i>Scientific Results</i> volume (data report ²⁴ or paper).
2.	If a scientific party member is unable to produce research results because appropriate samples or data were not retrieved during the cruise, or because data could not be obtained during postcruise analyses, a letter of explanation must be submitted to the ODP Publications Coordinator.	The letter of explanation will be copied by the ODP Publications Coordinator to the ODP Staff Scientist on the ERB for that leg, the ODP Publication Services Manager, and the ODP Curator for review and comment. If necessary, individual letters of explanation may be copied to the JOI Office for appropriate action.
3.	Failure to meet these obligations will result in the rejection of future sample requests and may influence participation on future legs.	

Continued on next page.

²¹Policy revision made June 2001. See [Appendix H.1.a.](#) for details.

²²Policy revision made June 2001. See [Appendix H.1.b.](#) for details.

²³See [Appendix A.1.b.](#) and [Appendix A.1.c.](#) for specific terms that apply to authors publishing in a scientific journal or book or the *Scientific Results* volume.

²⁴A “paper” presents the results of extensive research on aspects of scientific drilling related to the leg. It is complete and contains scientific interpretation of the data that was generated in the research supporting the manuscript. A “data report” is a short report of useful data that mainly consists of data sets and does not contain interpretation of results. (Policy update made October 2002. See [Appendix H.2.e.](#))

4.	The Co-Chief Scientists and the Staff Scientist may select an external member for the ERB. The need for external ERB members will be determined on a leg-by-leg basis, based on the Co-Chiefs' and Staff Scientist's workloads and expertise.	The ERB will remain active for 42 months postcruise. After the ERB term ends, the ODP Staff Scientist for the leg will coordinate the handling of additional contributions to the <i>Scientific Results</i> volume.
5.	It is the responsibility of the Co-Chief Scientist(s) from each leg to write or coordinate a Leg Synthesis paper to be published in the <i>Scientific Results</i> volume.	See the Co-Chief Agreement. This paper must cover all submitted, in press, and published papers in books, journals, and the <i>Scientific Results</i> volume.
6.	Comply with all written collaborative agreements that are identified in the leg-sampling plan and approved by the SAC before samples are distributed.	All collaborative agreements must be identified in the leg-sampling plan and approved by the SAC before samples are distributed.
7.	At the second postcruise meeting, submit final titles to the ERB for all papers that fulfill your ODP obligations and any supplementary publications you plan to publish.	
8.	In all publications, acknowledge the receipt of data or samples from ODP and the funding agency that supported the research and include specific key words related to ODP with their manuscript submissions. ²⁵	See Section 4.4.b.i. or Section 4.4.c.i. for required wording. ²⁵
9.	Complete the Postcruise Data Availability Form (see Appendix G) and submit it to the ODP Data Librarian (for contact information see Appendix C). ²⁶	
10.	Return all unused samples to the appropriate core repository no later than five years postcruise.	

²⁵Policy revision made June 2001. See [Appendix H.1.c.](#) for details.

²⁶Policy revision made April 2002. See [Appendix H.1.d.](#) and [Appendix H.1.e.](#) for details.

A.1.b. Terms that apply to authors publishing in a scientific journal or book

	Policy term	Notes
1.	Submit all manuscripts to a journal or book no later than 28 months postcruise.	
2.	Submit one electronic copy (http://www-odp.tamu.edu/publications/submit/) or five paper copies of each manuscript to the ODP Publications Coordinator at the time of submission to the journal or book. ²⁷ Include a cover letter that lists the publication venue and date of submission. ²⁸	The ERB has three months from time of receipt to check submissions for proper citation of site summaries and site chapters and for proper use of data and conclusions from other members of the scientific party.
3.	If the paper is accepted for publication, (a) submit an electronic copy of the following to the ODP Publications Coordinator: citation, abstract, and keyword list; and (b) send one reprint to the ODP Curator in either print format or PDF (http://www-odp.tamu.edu/publications/submit/). ²⁷	If this information is not submitted to ODP, you could be classified as a nonperformer.
4.	If the paper is rejected, submit a paper or a data report for the <i>Scientific Results</i> volume to the ODP Publications Coordinator no later than six months after receiving the rejection notice and follow the guidelines outlined in Section 4.4.c.iii. and in Section A.1.c. of this appendix.	

²⁷Policy revision made August 2002. See [Appendix H.1.f.](#) for details.

²⁸Authors should submit copies of all papers relating to postcruise research that they produce within 42 months postcruise, not only those that fulfill their ODP obligations or appear on the table of contents at the time of the second postcruise meeting.

A.1.c. Terms that apply to authors publishing in the *Scientific Results* volume

	Policy term	Notes
1.	<p>Submit one electronic copy (http://www-odp.tamu.edu/publications/submit/) or seven paper copies of each manuscript for peer review to the ODP Publications Coordinator between 13 and 28 months postcruise.²⁹</p> <p>All submissions must be received by the ODP deadline: Regular papers and data reports: 28³⁰ months postcruise. Synthesis papers: 35 months postcruise.</p> <p>Specific manuscript submissions deadlines are given for each leg in the “Publication Instructions for ODP Scientists” guide (http://www-odp.tamu.edu/publications/guide/DEADLN.HTML).³¹</p>	<p>Submissions must be of reviewable quality and meet ODP’s standards as outlined in the “Publication Instructions for ODP Scientists” guide (http://www-odp.tamu.edu/publications/CONTRIB.HTML) to fulfill the ODP obligations. Any that do not meet ODP standards will be returned to the author and won’t go through the review process unless they are revised to meet the standards before the deadline.</p>
2.	<p>Submit one electronic copy (http://www-odp.tamu.edu/publications/submit/) or two paper copies of each revised manuscript to the ODP Publications Coordinator by the following deadlines:²⁹</p> <p>Regular papers and data reports: 34³² months postcruise. Synthesis papers: 40 months postcruise.</p> <p>Specific manuscript submissions deadlines are given for each leg in the “Publication Instructions for ODP Scientists” guide (http://www-odp.tamu.edu/publications/guide/DEADLN.HTML).³¹</p>	<p>Upon acceptance and revision, <i>Scientific Results</i> volume papers will be processed for publication on the ODP Web site. The <i>Scientific Results</i> volume will be distributed on CD-ROM four years postcruise. A leg-related citations list will also be published on the ODP Web site.</p>

²⁹Policy revision made August 2002. See [Appendix H.1.f.](#) for details.

³⁰For authors whose journal or book submissions were rejected, their *Scientific Results* submission deadline is six months after rejection receipt.

³¹Policy update made October 2002. See [Appendix H.2.j.](#) for details.

³²For authors whose journal or book submissions were rejected, the ERB will determine their revision deadline.

A.2. Guidelines for investigators who receive samples after the 12-month moratorium

	Policy term
1.	Submit manuscript(s) to a journal or book based on research results.
2.	No later than 36 months after receipt of samples send to the ODP Curator either: (a) a reprint of the published manuscript, or (b) a progress report outlining the status of the research.
3.	Complete the Postcruise Data Availability Form (see Appendix G) and submit it to the ODP Data Librarian (for contact information see Appendix C). ³³
4.	Return all unused samples to the appropriate core repository no later than five years postcruise.

³³Policy revision made April 2002. See [Appendix H.1.d.](#) and [Appendix H.1.e.](#) for details.

Appendix B: Core Curation Terms and Definitions³⁴

In this appendix, ODP-related curatorial terms, concepts and requirements are defined and explained.

B.1. Scientific Party

The “scientific party” includes all scientists who sail on the leg, as well as any shore-based scientists who were granted permission from the SAC to receive samples or data from the leg within the moratorium.

B.2. Moratorium

The period from the beginning of a leg through one year after the end of a leg is designated as the “moratorium” period for a leg. During this moratorium, certain restrictions are applied to cores and data generated during the leg. The purpose of the moratorium is to ensure adequate time is allotted for scientific party members to conduct leg-related research before the cores and data are made available to the general scientific community.

B.3. Unique and Nonunique Intervals

A cored interval is designated “unique” if it has been recovered only once at a drill site. The most common occurrence of a unique interval is one that results when only one hole is drilled at a site. If the cored interval is recovered from two or more holes, then the interval is considered “nonunique.”

A critical exception to this definition occurs when drilling into igneous basement rocks, metamorphic rocks, or metalliferous deposits. Every hole drilled into these lithologies is considered unique because of their inherent lateral heterogeneity.

Lithostratigraphic analysis of advanced piston cores from multiple holes drilled at one site may reveal that short sedimentary intervals (generally less than two meters) are commonly missing between successive cores from any one drill hole, even where nominal recovery approaches 100%. These missing intervals can be ignored when considering whether or not an interval is unique.

B.4. Composite Splice

Paleoceanographic cruises typically recover sediment cores from multiple holes cored side-by-side at a given site using an advanced hydraulic piston corer (APC) and/or an extended core barrel (XCB). A composite stratigraphic depth section is constructed by establishing correlations between adjacent drill holes, using the variations in properties (“wiggles”) measured on cores by nondestructive sensors. A composite depth table describes the resulting (delta) depth-offsets between holes. These offsets represent the difference between the meters below seafloor (mbsf; i.e., cored depth) and the meters composite depth (mcd; i.e., composite depth) values that are derived from these

³⁴Policy revision made June 2001. See [Appendix H.1.a.](#) for details.

correlations. Another table describes the unique intervals in specific holes at a given site, which have been used to construct the “ideal” section, also known as the “composite splice.” The purpose of a composite splice is to describe the most complete sedimentary section at a given site, without gaps in core recovery (i.e., missing sediment), which then can be used for developing high-resolution sampling strategies and analyzing time series. Scientists often prefer to sample using the composite splice as a guide, rather than to sample down a single hole at a given site, because of these gaps in recovery between cores in a single hole.

B.5. Archive and Working Halves

Cores are split into halves for shipboard analysis to uniquely identify split-core halves for measurements and sampling. The halves are referred to as “working half” and “archive half.” The entire working half is available for sampling. The concept and definition of an archive half (see below) is designed to enhance scientific flexibility and to enable greater access to important material. In certain circumstances the archive is available for sampling (see below).

Before 1997, the archive was preserved (unsampled) and conserved in the repository, available only for nondestructive examination and analysis. Samples for destructive analyses were taken exclusively from the working half. Since 1997, the entire core has been available for sampling. The procedure of splitting cores into working and archive halves will continue, for practical and database purposes, but the concept and definition of an archive half has now been expanded and modified. This will enhance scientific flexibility by enabling greater access to important and often coveted material.

B.6. Permanent Archive

A “minimum permanent archive” is established for each ODP drill site. Archive core earmarked “permanent” is material that is initially preserved unsampled and is conserved in the core repositories for subsequent nondestructive examination and analysis. In “unique intervals,” this minimum permanent archive consists of at least one half of each core, excluding whole-round samples (e.g., for interstitial pore water analysis). If so desired, the SAC may choose to designate more, but not less, than this amount as the permanent archive. In “nonunique intervals,” the permanent archive will consist of at least one half of one set of cores that span the entire drilled sequence, again, excluding whole-round samples. The permanent archive is intended for science needs that may arise five years or more after drilling is completed.

In practice, if holes are cored continuously, the minimum permanent archive may consist of one half of each core taken from the deepest hole drilled at a site. As such, the archive halves of cores from additional holes drilled to equal or shallower depths, which contain replicate copies of stratigraphic intervals constituting the minimum permanent archive, need not be designated as permanent archive, but can be, if so desired by the SAC. If not deemed permanent archive, they are “temporary archive.” If a composite splice section is constructed and the sampling demand exceeds the working half, an alternative scenario may be required to make sure that all samples can be taken from the spliced section. In this case, the permanent archive can be defined from cores that are not part of the splice (e.g., from cores from different holes).

Sampling of the permanent archive is feasible five years postcruise if the working and/or the temporary archive halves of the core have been depleted, according to the ODP Curator and the CAB.

B.7. Temporary Archive

Cores taken from nonunique intervals that are not part of the “minimum permanent archive” will be considered “temporary archives,” unless stipulated otherwise by the SAC in the Sample Strategy. If required for special shore-based analysis, some cores may be left unsplit on board and shipped to the laboratory as whole-core sections. If split (the common scenario), the temporary archive may be sampled just like the working halves when (a) either the working halves have been depleted by sampling, or (b) when pristine, undisturbed material is needed for special sampling needs, such as taking U-channels or slab samples.

B.8. Critical Intervals

Critical intervals are lithologic spans of such scientific interest that there is extremely high sampling demand for them. These intervals may vary from thin, discrete horizons to thick units, extending over an entire core or more. Examples include, but are not limited to: décollements, sediment-basement contacts, igneous contacts, impact/tektite horizons, gas hydrates, marker ash horizons, scaly fabric, magnetic reversals, and particular biostratigraphic levels. The SAC is responsible for anticipating the recovery of critical intervals and for developing a strategy for sampling and/or conserving them. For postmoratorium sampling, the ODP Curator will work with investigators to ensure that previously defined critical intervals are sampled only when necessary.

B.9. Nondestructive Analyses

Requests to perform nondestructive analyses on cores (e.g., descriptions, imaging, X-rays) should be submitted to the ODP Curator after completing the ODP Sample Request Form. Investigators who carry out nondestructive analyses incur the same obligations as those scientists who request samples (see [Section 4](#) and [Section 5](#)).

Appendix C: Contact Information—Curatorial Advisory Board, Policy Overseers, and ODP Representatives³⁵

	Name	Contact Information
ODP Curator	Dr. John Firth ³⁶	E-mail: firth@odpemail.tamu.edu Phone: (979) 845-0507 Fax: (979) 845-1303 URL: http://www-odp.tamu.edu/curation/ Mailing address: Ocean Drilling Program, 1000 Discovery Drive, College Station TX 77845, USA
Curatorial Advisory Board (CAB)	Dr. Peter J. Michael	E-mail: pjm@utulsa.edu Phone: (918) 631-3017 Fax: (918) 631-2091 Mailing address: Department of Geosciences, The University of Tulsa, 600 S. College Avenue, Tulsa OK 74104, USA
	Dr. Kenneth G. MacLeod ³⁶	E-mail: MacLeodK@missouri.edu Phone: (573) 884-3118 Fax: (573) 882-5458 Mailing address: Department of Geological Sciences, University of Missouri–Columbia, 101 Geological Sciences Building, Columbia MO 65211, USA
	Dr. Jack Baldauf, ODP Deputy Director ³⁶	E-mail: baldauf@odpemail.tamu.edu Phone: (979) 845-9297 Fax: (979) 845-1026 Mailing address: Ocean Drilling Program, 1000 Discovery Drive, College Station TX 77845, USA
	Dr. Tom Davies, ODP Science Services Manager ³⁶	E-mail: davies@odpemail.tamu.edu Phone: (979) 862-2283 Fax: (979) 845-0876 Mailing address: Ocean Drilling Program, 1000 Discovery Drive, College Station TX 77845, USA

³⁵Policy revision made June 2001. See [Appendix H.1.a.](#) for details.

³⁶Policy update made June 2001. See [Appendix H.2.a.](#) for details.

Sample Allocation Committee (SAC)	For each leg, this committee is comprised of the Co-Chief Scientist(s), a Staff Scientist, and the ODP Curator.	Contact information for the Co-Chief Scientists and Staff Scientist of each leg can be found on the title page of the Scientific Prospectus or the list of Shipboard Participants in the <i>Preliminary Report</i> (http://www-odp.tamu.edu/publications/). See above for ODP Curator contact information.
Editorial Review Board (ERB)	For each drilling leg, this Board is comprised of the Co-Chief Scientists and Staff Scientist, and one external scientist.	Contact information for the Co-Chief Scientists and Staff Scientist of each leg can be found on the title page of the Scientific Prospectus or the list of Shipboard Participants in the <i>Preliminary Report</i> (http://www-odp.tamu.edu/publications/).
ODP Publication Services Manager	Ann Klaus ³⁷	E-mail: annklaus@odpemail.tamu.edu Phone: (979) 845-2729 Fax: (979) 862-3527 URL: http://www-odp.tamu.edu/publications/ Mailing address: Ocean Drilling Program, 1000 Discovery Drive, College Station TX 77845, USA
ODP Publications Coordinator	Gigi Delgado ³⁷	E-mail: delgado@odpemail.tamu.edu Phone: (979) 845-1909 Fax: (979) 862-3527 URL: http://www-odp.tamu.edu/publications/ Mailing address: Ocean Drilling Program, 1000 Discovery Drive, College Station TX 77845, USA
ODP Data Librarian	Kim Bracchi ^{37, 38}	E-mail: database@odpemail.tamu.edu Phone: (979) 845-8495 Fax: (979) 458-1617 URL: http://www-odp.tamu.edu/database/ Mailing address: Ocean Drilling Program, 1000 Discovery Drive, College Station TX 77845, USA

³⁷Policy update made June 2001. See [Appendix H.2.a.](#) for details.

³⁸Policy update made April 2002. See [Appendix H.2.c.](#) for details.

Scientific Measurements Panel	Co-chairs: Dr. Richard W. Murray ³⁹ and Dr. Eiichi Kikawa ^{40, 41§}	Richard W. Murray: E-mail: rickm@bu.edu Phone: (617) 353-6532 Fax: (617) 353-3290 Mailing address: Department of Earth Sciences, 685 Commonwealth Avenue, Boston University, Boston MA 02215, USA Eiichi Kikawa: E-mail: kikawa@jamstec.go.jp Phone: +81-46-867-9340 Fax: +81-46-867-9315 Mailing address: Deep Sea Research Department, Japan Marine Science & Technology Center (JAMSTEC), 2-15 Natsushima-cho, Yokosuka 237-0061, Japan A complete panel member list and e-mail links can be found at: http://joides.rsmas.miami.edu/panels/SCIMP.html
Joint Oceanographic Institutions, Inc. (JOI Office)	Dr. Frank R. Rack ^{40, 42}	E-mail: frack@joiscience.org Phone: (202) 232-3900, ext. 216 Fax: (202) 462-8754 URL: http://www.oceandrilling.org/ Mailing address: Joint Oceanographic Institutions, 1755 Massachusetts Avenue NW, Suite 700, Washington DC 20036-2102, USA
JOIDES Office	Elspeth Urquhart ⁴⁰	E-mail: eurquhart@rsmas.miami.edu Phone: (305) 361-4668 Fax: (305) 361-4632 URL: http://joides.rsmas.miami.edu/ Mailing address: JOIDES Office, University of Miami–RSMAS, 4600 Rickenbacker Causeway, Miami FL 33149, USA

³⁹Policy update made October 2002. See [Appendix H.2.d.](#) for details.

⁴⁰Policy update made June 2001. See [Appendix H.2.a.](#) for details.

⁴¹Policy update made February 2003. See [Appendix H.2.h.](#) for details.

⁴²Policy update made April 2002. See [Appendix H.2.c.](#) for details.

Appendix D: Leg-Specific Sampling Strategy Guidelines⁴³

Development of the leg-specific Sampling Strategy begins in the initial stages of leg planning, when ODP drilling proposals are written and submitted to the Joint Oceanographic Institutions for Deep Earth Sampling (JOIDES) Office. At this stage, proponents will develop a draft Sampling Strategy that will fulfill the scientific objectives of the leg.

Once a proposal has been scheduled for drilling by JOIDES and Co-Chiefs have been selected, the SAC will write a formal, leg-specific Sampling Strategy for publication in the ODP Scientific Prospectus series. The ODP Director and the Deputy Director will review the Scientific Prospectus before it is published. This will give them an opportunity to advise on sampling issues pertaining to the broader (non-leg-specific) community.

The Sampling Strategy will meet the specific objectives of the leg. The Sampling Strategy will define the minimum permanent archive and any supplements to it that the SAC deems necessary. The Sampling Strategy will also become the basis of the shipboard and moratorium “sampling plan.”

A successful Strategy will:

- (1) define the amount of core material available to the scientific party for sampling by deciding if (and when) more than a minimum permanent archive is needed;
- (2) anticipate and possibly define limits on the volume and frequency of shipboard sampling for routine analyses, pilot studies, and low-resolution studies;
- (3) estimate the sampling volume and frequency that is needed to meet the objectives of the leg, as per scientific subdiscipline and request type;
- (4) anticipate the recovery of critical intervals and develop a protocol for sampling and/or preserving them;
- (5) propose where and when sampling will occur. SACs are strongly encouraged to defer large-volume and high-frequency sampling to postcruise “sampling parties” at ODP core repositories;
- (6) determine special sampling methods and needs (e.g., Pressure Core Sampler, microbiology, whole rounds);
- (7) consider any special core storage or shipping needs (e.g., plastic wrap, freezing sections); and
- (8) identify disciplines/personnel needed for shore-based sampling.

The Sampling Strategy should be formatted using the following categories. For examples, review recent copies of leg-specific sampling strategies from previous legs in the Scientific Prospectus series (<http://www-odp.tamu.edu/publications/>). (Also see [Appendix B.](#))

Needs	Critical Intervals
Sampling Timetable	Permanent Archive
General Sampling Procedures	Temporary Archive

⁴³Policy revision made June 2001. See [Appendix H.1.a.](#) for details.

Appendix E: ODP Sample Request Form⁴⁴

An electronic version of the ODP Sample Request Form is available on the ODP Web site at <http://www-odp.tamu.edu/curation/subsfrm.htm>. Individuals who cannot easily access this form on the Web should contact the ODP Curator for a printed copy (for contact information see [Appendix C](#)).

Also see [Appendix F](#), which contains guidelines to assist in estimating sample volumes.

Appendix F: Typical Sample Volumes⁴⁴

The following volumes are guidelines, not limits.

Thin-section billets	10 cm ³ up to 50 cm ³ for large-grained plutonic rocks
Alkenone (U _k ³⁷)	5 cm ³
X-ray diffraction	5 cm ³
X-ray fluorescence	20 cm ³ (sediments), 20–50 cm ³ (igneous/sulfides—varies depending on grain size and homogeneity of rock)
Carbonate	2 cm ³
Paleomagnetism	7-cm ³ cubes, 12-cm ³ minicores, 600-cm ³ U-channels
Moisture and density	10–20 cm ³
Grain size	10–20 cm ³ , depending upon coarseness
Planktonic foraminifers	10 cm ³
Benthic foraminifers	10–20 cm ³
Nannofossils	2 cm ³
Diatoms	5–10 cm ³
Radiolarians	10 cm ³
Palynology	10–15 cm ³
Organic samples	20 cm ³
Interstitial porewaters	whole rounds 5–20 cm long, based on water content
Inorganic geochemistry	10 cm ³
Organic geochemistry	10 cm ³
Sedimentology	10–20 cm ³
Slabs (for laminae studies)	25–50 cm ³ , depending on slab length
Slabs (large grained plutonic rocks)	50–100 cm ³ , often shared by scientists for multiple analyses
Stable isotopes (C, O)	10–20 cm ³

⁴⁴Policy revision made June 2001. See [Appendix H.1.a](#) for details.

Appendix G: Postcruise Data Availability Form⁴⁵

This form should be submitted to the ODP Data Librarian to document research results produced from working with ODP samples and/or data (for contact information see [Appendix C](#)). An electronic version of this form is available on the ODP Web site at <http://www-odp.tamu.edu/publications/policy.html>.

Investigator name(s): _____

Date: _____

Data types: (check all that apply)

- Core description, Images
- Physical properties
- Chemical analyses
- Paleontology, Age
- Paleomagnetism
- X-ray
- Other (please specify) _____

Location of the data: (check all that apply)

- Available on the Web (address): _____
- Available by request (name, address, phone, e-mail): _____

Data reference information: (fill in all that apply)

Citation for paper where data was documented (include authorship, year, article title, journal, issue, and page range):

ODP leg(s) on which samples were collected:

ODP sample request number: _____

Key words: _____

⁴⁵Policy revision made June 2001. See [Appendix H.1.a](#) for details.

Appendix H: Summary of Policy Revisions and Updates Made After March 1999⁴⁶

Periodically policy revisions and administrative updates are made to this policy. This list summarizes the modifications that have been made to this document and the dates they were implemented.

H.1 Policy Revisions

Policy revisions are changes that affect the guidelines scientists must follow to fulfill their ODP obligation.

H.1.a. 1 June 2001

Removed guidelines for Scientific Party members on Legs 160–175:

- Removed text in Sections 4.4.b.i and 4.4.b.ii. and relabeled Section 4.4.b.iii. as Section 4.4.b.i.
- Removed Sections B.1.a. and B.1.b. from Appendix B and relabeled Section B.1.c. as Section B.1.a.
- Removed Appendix A “Summary of New Publications-related Policy Components.”
- Relabeled Appendixes B–G as Appendixes A–F.

H.1.b. 1 June 2001

Changed wording in Appendix A from “Investigators who receive samples” to “Investigators who receive samples or data”

H.1.c. 1 June 2001

Added acknowledgment statement and key words that authors should use in all ODP-related publications to appropriate sections.

H.1.d. 15 April 2002

Replaced wording in all appropriate sections:

“Submit all final analytical and/or descriptive data, preferably in electronic format, to the ODP Curator.”

with:

“Complete the Postcruise Data Availability Form (see [Appendix G](#)) and submit it to the ODP Data Librarian (for contact information see [Appendix C](#)).”

H.1.e. 15 April 2002

Added Appendix G: “Postcruise Data Availability Form” to the policy.

H.1.f. 19 August 2002

Added instructions for the new online manuscript submission process to all appropriate sections.

⁴⁶Policy update made February 2003. See [Appendix H.2.g.](#) for details.

H.2. Policy Administrative Updates

Administrative updates are changes that keep the policy current (such as address updates) and clarify existing policy guidelines. Updates do not affect the guidelines scientists must follow to fulfill their ODP obligation.

H.2.a. June 2001

Updated Appendix C:

- Revised area code and e-mail addresses for ODP/Texas A&M University staff members: ODP Curator, ODP Deputy Director, ODP Manager of Science Services, ODP Publication Services Manager, ODP Publications Coordinator, and ODP Data Librarian.
- Updated CAB member: Dr. Kenneth G. MacLeod replaced Dr. Richard Murray.
- Updated ODP Data Librarian: Paula Clark replaced Vasudha Chavali.
- Replaced Dr. Tom Janecek, SCIMP Chair, with Dr. James Allan and Dr. Eiichi Kikawa Co-chairs.
- Corrected mailing address for Dr. Frank Rack, Joint Oceanographic Institutions, Inc., from Suite 800 to Suite 700
- Updated JOIDES Office contact information: Dr. Elspeth Urquhart, Rosenstiel School of Marine and Atmospheric Science, University of Miami, Miami FL, USA, replaced Dr. Jeff Shuffert, GEOMAR Research Center, Kiel Germany.

Note: Some minor wording and organization changes were also made.

H.2.b. December 2001

Updated text:

- Added clarification (underlined words) to Section 4.4.b.
“Authors who wish to submit manuscripts (to *Scientific Results* volumes, journals or books) before the moratorium has expired must comply with the guidelines in this section.”

H.2.c. April 2002

Updated Appendix C:

- Updated ODP Data Librarian: Kim Bracchi replaced Paula Clark; added new e-mail address and phone number.
- Updated e-mail address for Dr. Frank Rack, Joint Oceanographic Institutions, Inc.

H.2.d. October 2002

Updated Appendix C:

- Replaced Dr. James Allan, SCIMP Co-chair, with Dr. Richard W. Murray.

H.2.e. October 2002

Updated text:

- Added footnote to Section 4.4.b.i. and Appendix A that defines *Scientific Results* “papers” and “data reports.”

H.2.f. October 2002

Updated text:

- Added link from Section 4.4.c.iii. to “Manuscript Submissions Deadlines” Web page that lists specific deadlines for each leg.

H.2.g. February 2003

Added Appendix H:

- Created Appendix H “Summary of Policy Revisions and Updates Made After March 1999” to document all modifications made to policy.
- Added references to Appendix H wherever policy updates or administrative changes have been made.

H.2.h. February 2003

Updated Appendix C:

- Updated contact information for SciMP Co-chair, Dr. Eiichi Kikawa.

H.2.i. February 2003

Updated text:

- Added guidelines to Section 4.4.b.i. that were previously implied for this section and were included in Appendix A.1.

H.2.j. February 2003

Updated text:

- Added link from Section 4.4.c.iii. to “Manuscript Submissions Deadlines” Web page that lists specific deadlines for each leg.