RECORD USE POLICY UPDATE AND OPEN DISCUSSION

OCLC Members Council

May 18, 2009

Jennifer Younger, Chair
Review Board of Shared
Data Creation &
Stewardship

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REVIEW BOARD MEMBERS

- Caroline Brazier (EMEA): Head of Resource Discovery, British Library

- Christopher Cole (FEDLINK): Associate Director for Technical Services, National Agricultural Library

- Poul Erlandsen (EMEA): Head, Document Access Services and Collection Management, Danish University of Education, National Library of Education

- Pat French (OCLC Western): Manager, Collection and Technical Services, Multnomah County Library

- Clifford A. Lynch: Executive Director, Coalition for Networked Information (CNI)

- Brian E. C. Schottlaender (OCLC Western): The Audrey Geisel University Librarian, UC San Diego Libraries

- Ted Schwitzner (ILLINET): Head, Bibliographic Services Division, Illinois State University, Milner Library

- Roberta Shaffer (FLICC/FEDLINK/LC): Executive Director, Federal Library and Information Center Committee, Library of Congress

- Lamar Veatch (COSLA/SOLINET): State Librarian, Georgia Public Library Service—University System of Georgia

- Elsie Weatherington (SOLINET): Dean, University Library, Virginia State University

- Jennifer Younger (INCOLSA): Edward H. Arnold Director of Hesburgh Libraries, University of Notre Dame

- Karen Calhoun, OCLC liaison

REVIEW BOARD CHARGE

- The Review Board on Principles of Shared Data Creation and Stewardship will:

    - Consult with librarians and member representatives as appropriate

    - Review reports, letters and comments including blog and listserv messages from the global library community regarding the revised Policy

    - Recommend principles of shared data creation and changes in the Policy for Use and Transfer of WorldCat Records that will preserve the community around WorldCat infrastructure and services, and strengthen libraries

PROCESS

- Weekly Review Board conference calls

- Library community meetings

- Review Board e-mail list and blog

- Organizational responses

  - AALL, ARL, ICOLC, OLAC, New Zealand, more

- Listserv messages, blog postings, petitions

- Review Board survey

OCLC REVIEW BOARD SURVEY

- Targeted librarians and other interested constituents

- Distributed to various library-related discussion lists, blogs, and available on Review Board web site

- 1,620 respondents completed the survey between March 25 and April 8, 2009

  - 82% OCLC members

  - 50% Academic libraries; 23% Public libraries

  - 21% from outside U.S.

  - 22% directors, 27% managers, 33% catalogers

BROAD ISSUES

- Lack of communication about the problem to be solved

- Non-consultative process

- Lack of clarity around core issues; for example, how can I use my records?

- Lack of awareness of existing Guidelines

- Not as clear a consensus about what OCLC is and does as there was in the past

- Lack of awareness by OCLC and members about divergence of views ('the gap problem')

IT'S A NEW ENVIRONMENT

OCLC

- OCLC member community includes libraries and other memory institutions

- Information ecosystem is bigger: consortia, networks, vendors, service organizations, and more

- Extend the reach of WorldCat in the information ecosystem

- Sustain the trust and member engagement in building WorldCat

- Move from data protection to data exchange

DIRECTIONS

- We affirm that a policy is needed, but not <u>this</u> policy

- Formally withdraw the proposed policy

- Until a new policy is in place, reaffirm the existence and applicability of the Nov. 16, 1987 "Guidelines for the Use and Transfer of OCLC-Derived Records."

DIRECTIONS

Revisit the social contract between OCLC and its members

- On what principles is it based?

- What are our respective rights and obligations?

- How do current documents relate?

- How can OCLC leadership <u>and</u> OCLC members reinforce the values of the collaborative?

- How can the collaborative work with others in the information ecosystem?

DIRECTIONS

- Discuss the role and value of WorldCat in the information ecosystem, and ways in which it can be leveraged:
    - by OCLC;
    - by libraries and other memory institutions; and
    - by other partners in the information ecosystem.
- Identify threats to the sustainability of WorldCat and strategies for protecting it against unreasonable use

DIRECTIONS

- Devise a process for drafting and maintaining a new policy that:
  - Includes formal participation by members of the Global Council, the OCLC Board, and the OCLC Strategic Leadership Team
  - Incorporates input from the broader community
  - Recognizes the complexity of the information ecosystem in which OCLC and its members operate
  - Is transparent
- Develop a process for ongoing review and updating using the same principles of consultation and transparency

DIRECTIONS

The new policy should:

- Be based on clearly articulated principles

- Impart confidence to members and partners building strategies predicated on WorldCat

- Support innovation

DISCUSSION

- Is the Review Board asking the critical questions?

- Your questions and advice

- Review Board online feedback forum:
  http://community.oclc.org/reviewboard/