

# OCLC Research and the RLG Partnership: A Five Year Overview of Accomplishments

Nearly five years ago, RLG and OCLC successfully merged and expert staff from both organizations were blended into one team with a combined effort directed toward supporting research libraries and archives. The merger created a venue where affiliated institutions could collectively identify, analyze, prioritize and design scalable solutions to shared information challenges.

Since then, OCLC Research and the RLG Partnership have collectively improved the current operating processes of research institutions as well as helped to define their future services. This document highlights some of the accomplishments over the last five years that have had high impact or have changed the topography of the information landscape.

## Research Information Management

### Issue:

- The way academic researchers access information has changed and academic libraries need to evolve to better meet their needs. Since researchers are no longer coming to the library, other ways need to be identified in which the library could be of service to the university's research mandate.

### Actions:

- Commissioned a study of various modes of assessing the scholarly output of an institution and published a companion report, [Research Assessment and the Role of the Library](#).
- Published [Support for the Research Process: An Academic Library Manifesto Report](#), which detailed the current nature of research in various disciplines.
- Published [A Slice of Research Life: Information Support for Research in the United States](#), which caused many academic librarians to reflect on whether they were providing value to the research process.
- Published [Research Libraries, Risk and Systemic Change](#), which provided an overview of the most significant risks facing research libraries and suggested strategies to mitigate them.

### Impact:

- Getting library services into the researchers' flow is now part of nearly every academic library discussion.

## Mobilizing Unique Materials

### Issues:

- Increasingly, making most of the world's books available online appears to be a near-term reality. If special collections are not online, they will not be thought of for use or for funding.
- Despite tacit agreement that collaboration is a worthy goal, little guidance existed on how to form durable and successful partnerships or how to assess their value.
- Although the need for increased library investment in revealing hidden collections was widely understood, no body of evidence existed to suggest whether collective investment was growing, or if the scope or use of these materials was on the rise.

### Actions:

- Made the case for relaxing quality standards for materials that were going to be preserved in their original form through the symposium, [Digitization Matters](#), and the report, [Shifting Gears: Gearing Up to Get Into the Flow](#).
- Investigated [public and private partnerships](#) to help institutions make better deals.
- Published the report, ["Capture and Release": Digital Cameras in the Reading Room](#), to address workflow and policy issues arising from digitizing and copying materials from special collections.
- Introduced balance in rights management, held the symposium, [Undue Diligence](#), which resulted in a community of practice regarding rights and unpublished works around a [well-intentioned practice for putting digitized collections of unpublished materials online](#).

- Acted both as a catalyst and as communication hub in the library, archive and museums (LAM) space. Developed and shared strategies for more effective collaboration among libraries, archives and museums (LAMs) operating under a single administration (e.g., universities and large, multi-part museums). Five workshops led to the publication of the report, [Beyond the Silos of the LAMs: Collaboration Among Libraries, Archives and Museums](#). Held the forum, [Yours, Mine, Ours: Leadership Through Collaboration](#), to provide an additional platform for deepening community knowledge of successful and failed strategies for collaboration.
- Published [An Art Resource in New York: The Collective Collection of the NYARC Art Museum Libraries](#) and [Museum Data Exchange: Learning How to Share](#).
- Surveyed 275 academic and research libraries throughout the United States and Canada to identify norms across the community and define needs for community action and further research. Published the results in the report, [Taking Our Pulse: The OCLC Research Survey of Special Collections and Archives](#).

#### Impact:

- It is now widely recognized that in this time of budget cutbacks, unused collections will not be retained. Significant strides have been made in helping libraries, archives and museums digitize their materials and increase access to them.
- Key collaborative initiatives are now taking place at and across many institutions.
- Data is now available that effectively supports decision-making for strategic priorities and collaborative projects, and enables individual libraries to place themselves in the context of relative norms across the community.

## Metadata Support and Management

#### Issues:

- Research institutions dealt with both MARC and non-MARC metadata with the same staff and use a wide variety of tools, standards, and data formats. Practices that could be shared needed to be identified, as well as the implications of MARC usage on library metadata practices. Ways to take advantage of Web 2.0 features were also needed to attract user contributions to enhance our metadata.
- Information to sufficiently distinguish people and organizations with similar names and multiple forms was needed across various communities, including users in the Web networked environment.

#### Actions:

- Analyzed the workflows used for dealing with non-MARC metadata and the implications of MARC tag usage, reinforcing that we the community needed to collaborate on moving beyond MARC. Published [What We Learned from the RLG Partners Metadata Creation Workflows Survey](#) and [Implications of MARC Tag Usage on Library Metadata Practices](#).
- Identified the requirements of a “[Cooperative Identities Hub](#)”—a framework for concatenating and merging authoritative information that could be re-used in local contexts, reflected in [WorldCat Identities](#) and the [Virtual International Authority File](#) (VIAF). Published the report, [Networking Names](#).

#### Impact:

- The community’s view about these issues has been synthesized and an empirical base now exists against which current strategies can be objectively assessed.
- RLG Partner suggestions were incorporated into WorldCat Identities, resulting in a significantly improved user experience.
- VIAF is supporting name disambiguation internationally.

## System-wide Organization

#### Issue:

- Many research institutions were exploring cooperative service models to reduce costs and increase efficiencies in local print collection management. For this to achieve lasting impact, a significant change in the system-wide organization of library services is required.

#### Actions:

- Defined the problem space and coined the phrase “collective collection.”
- Analyzed large-scale holdings and began working out commonly agreed upon policies to rationalize overlapping general collections and design system-wide solutions.
- Expanded the global human network of trusted interlending partners, and extended the machine network of participating institutions.
- Streamlined processes, modified policies and identified “green” practices in the report, [Greening Interlibrary Loan Practices](#).

#### Impact:

- The term “collective collection” is now standard parlance in the community, which is now seriously engaged in managing redundant print collections cooperatively.

#### Tools and Solutions

##### Issues:

- The ability of research libraries to innovate is hampered by inadequate access to the data they have contributed to OCLC.
- Libraries and archives lose tremendous amounts of money annually to loss and theft of rare materials. The stigma associated with disclosing this loss has kept the real costs hidden and prevented the development of solutions.
- Libraries, archives and museums were interested in extracting data out of collections management systems and sharing them in a standards-based format, but no tools existed to enable this.

##### Actions:

- Progressively opened up the WorldCat database to software applications, including mobile device apps and local discovery interfaces.
- Made considerable progress in speeding up and enhancing the pace and quality of innovation in library services, including xID and WorldCat Identities that have mined value out of the WorldCat aggregation as well as other data sources.
- Contributed to the development of mobile applications that use the OCLC discovery environment and provided insights on successful mobile app development.
- Assisted in forming the OCLC Developer Network—a platform that supports participation by developers to discuss, learn, and share their open source code to improve the value of OCLC data for all users by enabling new Web Service uses.
- Collaboratively created [COBOAT](#) and [OAICatMuseum 1.0](#) software tools for extracting data out of collections management systems and sharing them in a standards-based format.
- Devised the [Missing Materials Beta Procedure](#), a low-cost method of pooling information so that librarians, dealers and law enforcement can work together to provide centralized, highly visible exposure of “missing materials” to help identify stolen materials, recover missing items and deter future crimes.

##### Impact:

- These services are now available to OCLC member libraries at no charge to enhance their local service offerings by innovating and sharing their innovations on our platform portal. In addition, users can access WorldCat from their mobile devices, making it easier to discover and access library materials.
- Tools now exist to support standards-based data sharing in the museum community.
- A solution to the global challenge of theft in cultural institutions was developed without a large investment of capital. As a result, missing materials are now routinely being identified, shared and—often—recovered.

In addition to the actions above, a robust program of publications, symposia and webinars to both gather and share information was rolled out over the past five years, facilitating serious discussion and provoking individual and collective action. All of these efforts have brought to fruition a powerful, globally influential program of work that has provided significant value to the library, archive and museum communities worldwide.