

Global Council Communications Task Force Report

August 2011

Introduction - Communications task force charge

At the October 2010 meeting of Global Council in Dublin, Ohio, the Executive Committee determined to form a Global Council Communications task force, "To study and assess current communications and to recommend ways and means for strengthening local, Regional and global communication." The development of a new governance structure including the creation of three Regional Councils and the focus on globalization of the OCLC cooperative requires clear and candid communication among all constituents to ensure clarity and consistency of message and to enable OCLC's cooperative and collaborative mission. The Task Force was asked to focus its attention on three activities:

1. Identify Global Council stakeholder groups and relationships
2. Create a map of the current communications landscape including paths, means and the substance/content of communications between and among these groups
3. Develop a proposal for a strategic communications initiative

The Committee set about its task by: holding a series of meetings by teleconference; conducting an audit of communications received by members of the Task Force; and seeking direct input from Global Council Members through roundtable discussions at the Global Council meeting in April 2011 in Dublin, Ohio. The conduct of this survey was preceded by a brief presentation on progress and a preliminary "communications map" created to stimulate thought on current communication pathways and gaps. This report is a summary of those dialogues and observations and directions emanating from them.

As a cautionary note, the Task Force completed its work over a relatively short period of four months and felt the time was insufficient to deal in detail with the many players and complex communication channels and layers that govern the day-to-day activities of the cooperative including its Members, governing bodies and corporate activities. This report, then, is far from a complete representation of communications issues and opportunities but rather a preliminary overview to encourage further discussion and engagement among all involved to improve communications throughout the organization.

I. Global Council stakeholder groups and relationships

There are fundamentally five major stakeholders within the governance structure of OCLC: OCLC management and staff, the Board of Trustees, Global Council, Regional Councils and the Members.

- A. Board of Trustees:** “The Board works to align OCLC’s product, research and advocacy strategies with OCLC’s mission: to connect people to knowledge through library cooperation. To ensure that OCLC remains a strong collaborative, the Board encourages a culture of cooperation and vigorous debate.”

The Board’s primary communication is with OCLC staff and management through committee meetings and five formal board meetings each year. Communication between the Board and Global Council occurs through six representatives on the Board who are elected by the Global Council. Members of the Board also attend Global Council Annual meetings and, from time to time, annual meetings of the Regional Councils. Contact with Members is mainly through Global Council and the Regional Councils.

- B. Global Council:** The communication obligations of the Global Council are fairly well defined in the document produced in 1990 titled, “Mission and Goals” (Appendix B). The Board of Trustees, OCLC Management, the Regional Councils and the Members all have an interest in, and provide input to, the Global Council because of its various functions as a major participant in the governance of OCLC and the Planning Process of OCLC. Global Council’s relationship with the Members directly is less well defined than with the other stakeholders. Whatever relationship exists with the Members occurs primarily through their interactions with the Regional Councils, OCLC staff and being represented by Delegates in these Councils.

Global Council is formally obligated to “provide the Board with written summary reports of significant Global Council activities” and to, “provide opportunities for Global Council to maintain open dialogue with the Board in order to discuss matters of strategic importance” (Goal II, Subgoal B, *Mission and Goals*). Global Council has met these obligations by providing annual reports to the Board as well as copies of reports concerning specific initiatives such as the work of Task Forces (e.g., the Records Use and Cost Sharing Task Forces), through six Global Council elected members and participation in the one or two Global Council in-person meetings held yearly. This has worked relatively well; however, there is a clear feeling within Global Council that communication of the Board to Global Council and input from Global Council to the Board on strategic issues should be increased to strengthen the relationship between the two bodies.

- C. Regional Councils:** The relationship between Global Council and the Regional Councils as well as among the Regional Councils themselves can be best defined as evolving and developing; still very much in the formative stage. Critical to understanding the relationships that exist and those that might develop is acceptance of the fact that the Regional Councils do not represent three uniform entities: they are not at the same stages of development; their relationship with OCLC staff and management is not necessarily one of a collaborative or cooperative; the Membership of some Regional Councils interact with OCLC primarily as a vendor rather than a cooperative; the size and potential size of the Membership represented by each Council varies significantly; and the relationship of the Councils with the Members is less well established. There are large communications issues within these Councils let alone the voice these Councils might have within Global Council and with OCLC management and staff given their delegate size.

Global Council Delegates and other Members actively involved in Regional Council committees and other groups should be most directly connected with the Members of a Region, but the degree and significance of that connectivity varies depending on the role OCLC management plays relative to the Members within each

Region. In New Zealand for example, the close relationship that exists with the National Library and OCLC is not with or through the Asia Pacific Regional Council but directly with OCLC staff.

- D. Members:** There is certainly some ambiguity and hence confusion around the term “Member.” Within the context of governance, OCLC Members are the libraries, archives and museums who are typically represented by an internally appointed representative who can vote on behalf of the member institution, usually the Director or Head. OCLC staff, however, have considerably more dealings with the staff of Member institutions who work with OCLC products and services. It is the staff of member institutions who have a very definite direct impact on OCLC products, services, directions and developments (e.g., advisory groups and user groups). The Global Council typically receives input from this group indirectly through its delegates and the Regional Council rather than directly as OCLC staff might. This poses its own set of communications challenges.

While much emphasis has understandably been placed on governance in the past two years, Global Council has not neglected its mandate in planning. Most recently this has included developing cost sharing pricing models for the cooperative, enhancing WorldCat quality and developing a dispute resolution process under WorldCat rights and responsibilities. These issues have involved interaction with the Board and quite focused interaction with the Regional Councils and Delegates, as well as input from members at large

- E. OCLC management and staff:** Tasked with the day-to-day operations of the cooperative as well as with facilitating and managing most communications programs.

II. Current communications flow and detail diagrams

The “Communications Flow Detail” and “Communications Flow Diagram” which appear as attachments to this document (Appendixes C and D) are intended to represent the complexity and richness of the communications that currently exist among the current stakeholder groups. The preponderance of communication moves from the Members, the Regional Councils, Global Council and the Board to OCLC staff. This makes perfect sense since the staff of the Member libraries, archives and museums seek services and products from OCLC and the governance entities are there to provide guidance and advice to OCLC management and staff. The interaction and communication that occurs among the governing bodies is naturally directed inward and consists largely of discussion of advice to be provided to OCLC staff.

The Task Force would like to highlight a few of the preliminary findings emanating from an analysis of the communications grid and map:

- A. Regional Council to Regional Council:** Communication between Regional Councils is limited except through formal channels, although some potential for mutual support has been evidenced, for example, in sharing of language skills.
- B. Regional Councils to Members:** Communications between the Regional Councils and Member varies significantly among the Councils with the Americas Regional Council being the most fully developed. Nevertheless, large communications gaps exist even here particularly with the addition of the Caribbean, Central America and South America.

- C. **Member to Member:** OCLC Members have one or more common frames of reference. In this context the strongest is use of OCLC products and services, which support areas of development such as cataloguing, resource sharing and single search across library, museum and archive collections.

Where interest has been harnessed, such as the Developer's Forum, the community has come together and there is productive Member-to-Member communication which also involves OCLC. There could be much more of this type of activity within and across Regions.

- D. **OCLC to Members:** *By far the greatest amount of communication occurs between OCLC staff and the Members in the form of reports, newsletters, product announcements, marketing and help with the development, implementation and delivery of products and services.* This applies especially to Members as staff of Member libraries but also to the specific representatives of those Member libraries (mostly library directors). OCLC staff are (May 2011) analyzing OCLC's internal communications and its communications with Members and the Global Council, recognizing that this is an essential element in its continued engagement and success.

OCLC Liaison Staff and Regional Offices play a central role in Region Councils, amassing great experience in the working of the cooperative as well as having a linking communications role between the Regional Council, OCLC Regional Offices and OCLC Ohio.

- E. **In-Region Bodies to Members:** Communication within Regions is complex. In some countries or areas language and culture differences require intermediary bodies to act as translation or packaging agencies that interpret and relay communications relating to the cooperative for dissemination to Members. These could be distributors, societies or professional organizations; their formal role in such communications is unclear.
- F. **Members to OCLC, Regional Councils, Global Council:** As mentioned, the predominant communications activity occurs between the staff of Member institutions and OCLC itself. Communication of these "Members" with other parts of the governance structure is minimal. In many respects this has worked brilliantly with OCLC developing appropriate products and services in response to users in the field. **This raises a fundamental question of the degree to which and at what level the various Councils need to be engaged with Members 'on the ground'.**

The current Global Council and Regional Councils have placed a renewed emphasis on OCLC as a cooperative. It is in this context that the need for more direct communication of the Councils with the Members needs to be examined.

- G. **Board of Trustees to Global Council and Regional Councils:** The major communication link between the Board and Global Council is through the six members of the Board elected from the GC. One or two Board members typically present a report at in person Global Council meetings. Communication between the Board and the Regional Councils is minimal with the occasional Board member making a presentation at a Regional Council meeting virtually or more rarely, in person.

III. Further findings

A. Roles and responsibilities

1. As may be expected given such a substantial change to the governance structure of the OCLC cooperative, uncertainty remains as to the nature and role of the different elements of the 'new' structure. This applies within the OCLC community as well as beyond it. Despite significant promotion during and following the transition from Members' Council to Global Council, and an updated definition of Membership, many Members still do not understand they are Members. This inhibits engagement and communications. There also remains a lack of clarity – both for Members and non-Members – as to what Membership means or what differentiates them from OCLC customers and participants. For example, conditions for Membership are deliberately broad and can be met without an institution having to decide to become a Member (for example, there is no fee to join; sharing of holdings, resources and expertise is the norm in libraries).
2. Global Council, Regional Councils and Delegates were created to provide governance because OCLC is a cooperative as well as a vendor. The tension and difference between these two identities impact on the Councils and the role of Delegates. As is the case for the concept of 'Membership', there is need for greater understanding and communication within Global Council and beyond OCLC about what *active* role 'the cooperative' has within OCLC. This is a fundamental issue for OCLC.
3. There has been a strong emphasis in communication on the formal *governance* role of the Regional Councils (and Delegates). This is partly owing to the need to communicate and establish a new governance structure. A focus on 'representation' would convey a more appropriately community-oriented message:

"What do Global Council Delegates do?"

"How do Delegates represent?"

Although induction programmes are provided for new Delegates, the role and responsibilities of Delegates are not well understood, by Members or the Delegates themselves. This applies to both Regional Councils and Global Council. Further information and guidance could be provided on this.

The landscape of each Region and the function of each Regional Council are different from the other Regional Councils and each has unique complexities and issues to resolve.

B. Communication

1. The volume of communication relating to the cooperative is very low in comparison with the high flow of communications from OCLC staff related to marketing and product-related information, and as a result the two streams tend to be merged. This erodes the distinction between vendor and cooperative, and is compounded by OCLC's being one among many organizations and other channels with which busy Library Directors and staff interact.
2. With the exception of Americas Regional Council, which is more active through its Ning site, communication from Regional Councils to Members is as yet largely limited to information on the Regional annual meetings and governance matters. In addition, Regional Council news and updates are

delivered through the global OCLC eNews mailing (albeit with a Region sub-heading). These and other examples serve to de-emphasise Regional Councils and their role.

3. Information on and communication relating to the cooperative is distributed throughout a number of locations, for example the Global and Regional Council Web sites, WebJunction private site, the ARC and EMEA Ning sites and the main OCLC Web site. A Member or Delegate may need to traverse a variety of platforms to find the information they need and to engage with other Members. This distributed approach has evolved organically and needs to be reviewed as alternative models now exist. For example, Regional Council sites could be provided from outside OCLC, with information about the functioning of the cooperative primarily devolved to these to emphasise the importance and separateness of the Regional Councils, or all sites could be within a centralised and coherent infrastructure which would emphasise connectedness. Given OCLC's upcoming transition to a new Web delivery platform it would be appropriate timing for Global Council and OCLC to develop a preferred strategy.
4. It is not currently easy for an OCLC Member to ascertain which other organizations are also Members. The potential for Member to Member and other communication—and cooperative activity—would be improved if a list of Members was available.

C. Cooperative Activity

Similar consideration could be given to facilitating and encouraging cooperative activity amongst Members around OCLC products and services or areas of more general research development.

For example, the work of the Research Libraries Partnership is based around community involvement in particular fields and it may be possible to extend this model. Many OCLC Members are involved in development activity, much of it cooperative (e.g., WMS Advisory Council). Where partners are OCLC Members, might OCLC's new platform provide a 'space' for them to operate in? If feasible this could be promoted within Regions and at Global level to encourage community building, engagement and communication with the cooperative.

[This is a chicken and egg situation – until such a resource exists and until it has been available for some time there is limited understanding of whether and how it will be used, what the most appropriate platform will be, and whether this should be an integrated OCLC platform or provided 'outside' OCLC.]

IV. Recommendations

The recommendations being put forward are wide ranging and affect all levels of the organization. Responsibility for implementation will rest both individually and collectively with the Board of Trustees, Global Council, the Regional Councils, OCLC management and the Members themselves. An initial task will be to sort out how responsibility for implementation can most effectively be allocated.

A: Roles and Responsibilities:

1. Further effort should be put into improving understanding of Membership. This is not to seek exclusivity, but to describe inclusivity: for example, documenting for current and potential Members what being a Member means, what are Member-like behaviors, and where Regional Councils and Global Council have facilitated cooperative activity. An aim might be to demonstrate the distinction between a typical vendor's user group and the OCLC cooperative. Examples should be given that build a picture, not only of what Membership looks like now but also how Members might together develop the cooperative. These could be linked with existing statements of principle such as the *Shared Values and Membership Principles of the OCLC Cooperative*.
2. A Directory of Members should be provided. This would support a sense of identity as a Member and offer other opportunities for communication and sharing.
3. Understanding of and communication regarding the nature and role of the representative/governance elements of the OCLC cooperative, e.g., Global Council, Regional Councils and Delegates, should be improved. This applies within these elements as well as to Members and beyond.
4. The roles and responsibilities of Delegates should be clarified and widely communicated.
5. Although the governance role of Global and Regional Councils is important for OCLC, there is a need for stronger emphasis on the *representative* role of Delegates and Regional Councils (as well as Global Council) in communication. For example, communication about which Member issues have been brought through the Regional Councils to Global Council and how Global Council has influenced OCLC's direction or activities for Member benefit could be disseminated to reinforce messages about the cooperative and the returns from engaging with it.
6. There should be an induction packet for Delegates, including a 'Delegates Handbook' (or equivalent). This could include a wide range of information, for example, from what is expected of Delegates to guidance on how they can participate in Global and Regional Council activities to the challenges of being a member of *Global Council* and promoting the cooperative.
7. Global Council should review and update as necessary the document Global Council Mission and Goals (appended as Appendix B) and in particular Goal II, and ensure that recommended practices with respect to mentorship in Goal II Sub-goal D are observed.

B. Interaction between Bodies:

1. Interaction between Global Council and the Board of Trustees should be strengthened, for example, to harness Global Council's potential input to strategic planning.
2. Differences and similarities between the Regional Councils need to be explored and articulated to improve understanding of the global cooperative.

3. Establishing a Communications Committee or officer/Delegate responsible for considering communication in each Region would focus on the flow of communication for each Region. It would also provide a single point of contact for all issues or questions that Members might have related to communications.
4. Global Council should establish a Communications Committee with representatives from each Region to look at communications across and within Regions and at Global Council's role in communications.

C. Identify and Develop Mechanisms for two way dialogue within all levels of the cooperative

1. **Communications:** Taking into account the development of OCLC's new Web platform, Global Council should provide input to OCLC Management on a preferred model for how communication and information about the cooperative is presented (for example, a distributed or centralised approach).
2. **Communications map:** The Task Force has begun to create a map of communications across the cooperative. This has the potential to be a powerful tool in understanding how the cooperative functions and what must be considered (e.g., Regional differences) to ensure effective sharing of information and engagement with the cooperative. The map is incomplete and work on it should continue to identify bi- and multi-directional communications, strength/volume of communications, and communication gaps.

The unique communication features of each Region should also be mapped in detail. This will include flows and structures and reflect language and cultural requirements impacting on communications. A similar map should be created for inter-Region communications, and both should be reflected in the global communications map.

3. **Cooperative Activity:** Global Council and OCLC should consider the implications and potential opportunities of providing a 'platform' for Members focused on facilitating cooperative activity of different types, from simple communication to shared interests to an environment facilitating joint working. Consideration should also be given to who should be able to access and use this platform.

V. Strategic communications initiative

- A. A major thrust of this Task Force was to provide a specific piece of strategic advice going forward to address ongoing issues and opportunities within the OCLC communications landscape. The Task Force in its brief time and in this brief report has tried to demonstrate that the communications challenges faced by OCLC and its governing structure are significant and ongoing and will not alone be resolved by the one-time implementation of a number of recommendations.
- B. The most significant strategic thrust that OCLC can undertake is to ensure that "communications" remain a part of discussions of all the governing bodies of OCLC and that each of these bodies designates at least one individual to be responsible to ensure that all of OCLC continues to improve communications on all fronts. In addition, Global Council should create a Global Council Communications Committee to drive and support this. This is an extremely important matter as OCLC develops further its global interest and perspective and the various Councils develop their roles in supporting the mission of the cooperative.
- C. In light of the implementation of OCLC's new Web platform Global Council should make a strategic decision regarding the model for how and where information and communication around the cooperative occurs.

- D. Similarly, Global Council and OCLC should consider the potential for and implications of utilizing the new platform to enable a space for Member to Member and other cooperative activity.

VI. Progressing effective communications within the cooperative

- A. The work of the Task Force has surfaced a number of issues that might be considered beyond its core focus. However, these are connected with and have a direct impact on communications within the cooperative as well as on OCLC generally. They have been included as findings and recommendations of the Task Force as they need to be addressed. Should they be accepted in total or in part by Global Council the Task Force recommendations require further work to be undertaken. Some of the recommendations can be fulfilled relatively quickly; others will require considerable exploration, consideration by Global Council and, potentially, OCLC management for implementation.
- B. One of the Task Force recommendations is that Global Council forms a Communications Committee with representation from all Regions. Should this recommendation be approved by Global Council the Task Force proposes that the Communications Committee be charged with acting on other recommendations of the Task Force that are approved by Global Council.

APPENDIX A



Global Council Communications Task Force
10 February 2011

Sponsor: Global Council
Start: 1 March 2011
End: 30 June 2011

Charge

This charge convenes a Communications Task Force to draft a proposal for a strategic communications initiative that will advance the public purpose of OCLC through the creation and implementation of a more robust communications infrastructure. The purpose of a communications infrastructure is to support OCLC governance groups in achieving their missions, facilitate a dynamic, interactive and flourishing online community among all OCLC stakeholders and enable a shared vision of collaborative endeavors between and among Members and OCLC, working in a virtual, shared environment for the benefit of the full community. The Task Force will convey its report and recommendations to the Global Council Executive Committee for review and presentation to the full Global Council. Subsequently, the Global Council will convey its recommendations to the Regional Councils, the OCLC Board of Trustees and the OCLC Strategic Leadership Team.

The Task Force will focus its attention toward the following activities:

- Identify Global Council stakeholder groups and relationships,
- Create a map of the current communications landscape including paths, means and the substance/content of communications between and among these groups, and
- Develop a proposal for a strategic communications initiative.

Need for Task Force

During the 2010 October Meeting in Dublin of the OCLC Global Council Executive Committee, the committee raised concerns about communication with the large number of Members and potential Members of OCLC worldwide. Executive Committee Members noted the importance of strengthening communication between and among the key governance groups, the various councils and OCLC management together with the need to understand the mutually-informing role of the Global Council with other governance bodies, including the Board of Trustees, Senior Leadership Team, and Regional Councils. The new governance structure encompassing a Global Council and Regional Councils along with the rapidly-expanding globalization of OCLC requires new and

expanded means to ensure correct, consistent and candid communication in an open environment between and among the various groups and individuals.

By common consent, the GC Executive Committee determined to form a Global Council Communications Task Force to study and assess current communications and to recommend ways and means for strengthening that local, Regional and global communication. Indeed, the GC Communications Task Force is charged to prepare a report on the current status of communication among the identified groups and to develop a proposal for a strategic communications initiative that would ensure all OCLC Members around the world including libraries, archives, museums and similar cultural heritage organizations:

- Understand the OCLC cooperative as an innovative forum for the broad and open discussion of issues, policies, services and emerging trends with within and without the cooperative
- Are aware of the roles of the various governance groups including the Board, Global and Regional councils and their roles in gathering input and concerns from the Membership
- Engage with the Global and Regional Councils by participating in the Regional elections, meetings, committees, and communication in an interactive, online community, and
- Engage in collaborative endeavors with OCLC and/or Members in a virtual, shared environment.

Meetings

- March 1 – June 2011. The Task Force is expected to meet periodically via conference calls.
- 11-13 April 2011. The Task Force will meet at the Global Council annual meeting.

Updates and reports

- The Task Force will host a discussion at the Global Council Annual Meeting April 2011.
- The Task Force will share a draft report with other governance bodies including the Regional Councils, BoT, and SLT prior to submitting its final report and recommendations.
- The Communications Task Force will submit its report and recommendations to the Global Council Executive Committee by 1 June 2011, which the GC EC will share with the OCLC Board of Trustees and the OCLC Senior Leadership Team.
- The Communications Task Force will present its report and recommendations to the Global Council in June 2011.

Membership

Co-chairs:

- William Maes, Dalhousie University, Canada, ARC
- Robin Green, University of Warwick, UK, EMEARC

Delegates

- Beverly Obert, Rolling Prairies Library System, US, ARC
- Hsueh-hua Chen, National Taiwan University, APRC

- Simon Bains, University of Edinburgh, EMEARC
- Jennifer Younger, President, Global Council (ex officio)

OCLC Staff

- Kate Gaylord, Director of Communications and New Media
- Janet Lees, Community Liaison
- George Needham, Vice President, Global and Regional Councils

APPENDIX B

Global Council Mission and Goals

Mission Statement

The OCLC Global Council supports the OCLC Mission by serving as a key link between Member libraries and OCLC management, facilitating communication and responding to expressed concerns from Global Council Members, general Members, and others to help shape future directions of the organization.

Goals and Subgoals

- Goal I. Participate in the governance of OCLC
- Subgoal A. Elect to the OCLC Board of Trustees six (6) trustees who exhibit knowledge of and concern for OCLC and for the development of libraries and librarianship.
- Objective 1. Hold board elections every two years or as needed.
- Objective 2. Encourage communication to promote continued election of highly qualified individuals.
- Subgoal B. Approve or reject, without modification, amendments to the Articles of Incorporation and the Code of Regulations as presented by the Board of Trustees.
- Objective 1. Discuss and vote as needed on amendments received from the Board of Trustees.
- Goal II. Ensure effective communication between and among the Global Council, Regional Councils, the Board of Trustees, OCLC and Members.
- Subgoal A. Ensure effective communication among the Councils and Members.
- Objective 1. Report on Global Council activities orally at network meetings and publish reports in appropriate library publications.
- Objective 2. Identify issues of strategic importance to OCLC and disseminate information about them to delegates, OCLC staff, and others.
- Subgoal B. Communicate with the OCLC Board.
- Objective 1. Provide the board with written summary reports of significant Global Council activities.
- Objective 2. Provide opportunities for Global Council to maintain open dialogue with the board in order to discuss matters of strategic importance.
- Subgoal C. Communicate with OCLC senior management.
- Objective 1. Provide OCLC senior management with written summary reports of significant Global Council activities.
- Objective 2. Promote attendance of OCLC senior staff at Global Council meetings.
- Objective 3. Provide opportunities for OCLC senior staff to maintain an open dialogue with Global Council.

- Objective 4. Inform OCLC senior staff of issues of concern to Global Council delegates and the organizations they represent.
- Subgoal D. Conduct an annual orientation for new delegates to help familiarize them with Global Council activities and OCLC.
- Objective 1. Assign mentors from the current roster of Members Council delegates to each new Global Council delegate.
- Objective 2. Provide mentors with guidelines and material that will assist them in their orientation activities with new delegates.
- Objective 3. Schedule a specific time for orientation and mentoring activities during the fall meeting of Global Council.
- Goal III. Participate in the OCLC Planning Process
- Subgoal A. Identify issues of importance to OCLC and its Member institutions and plan programs that clarify these issues for Global Council delegates.
- Objective 1. Develop Global Council programs that address future needs of librarians, libraries, and their patrons, and structure such programs so that Global Council can formulate recommendations to OCLC.
- Objective 2. Forward recommendations that emerge from Global Council discussions to OCLC management.
- Objective 3. Seek reports from OCLC management on results of Global Council recommendations.
- Subgoal B. Identify needs and requirements of libraries and their patrons that could result in a product or service offered by OCLC; for example, provide input to OCLC to help create product and service work flow scenarios.
- Objective 1. React to product and service ideas that OCLC management is considering. Such reactions should focus on implications of such products and services for Member libraries, the likelihood of adoption, and barriers to such adoption.
- Objective 2. Recommendations on products and services to OCLC management should provide a statement of implications of such products and services for Member libraries, the likelihood of adoption, and barriers to such adoption.
- Subgoal C. Cooperate with OCLC staff in monitoring the technological, political, economic, regulatory, and other environmental factors that must be considered for planning.
- Objective 1. Individual Global Council delegates report developments in the information and library environments to OCLC.
- Objective 2. The Global Council Executive Committee should, jointly with OCLC management, review reports of recent developments in the information and library environments and provide OCLC management with feedback on the implications of such developments.
- Objective 3. The Global Council Executive Committee should assign special interest groups specific charges to review recent developments in areas that are germane to their content area.

Subgoal D. Develop focus areas of strategic concern and assign delegates to examine the areas in detail on an ad hoc basis.

Objective 1. The Global Council Executive Committee should annually identify areas of strategic concern and recommend possible areas of study.

Objective 2. The Global Council Executive Committee should regularly review the scope of coverage of the interest groups and assign new responsibilities to them as developments warrant.

Objective 3. The Global Council Executive Committee should regularly review strategic concerns and, when they cannot reasonably be assigned to a special interest group, appoint an ad hoc group to study an issue and prepare a report for Global Council.

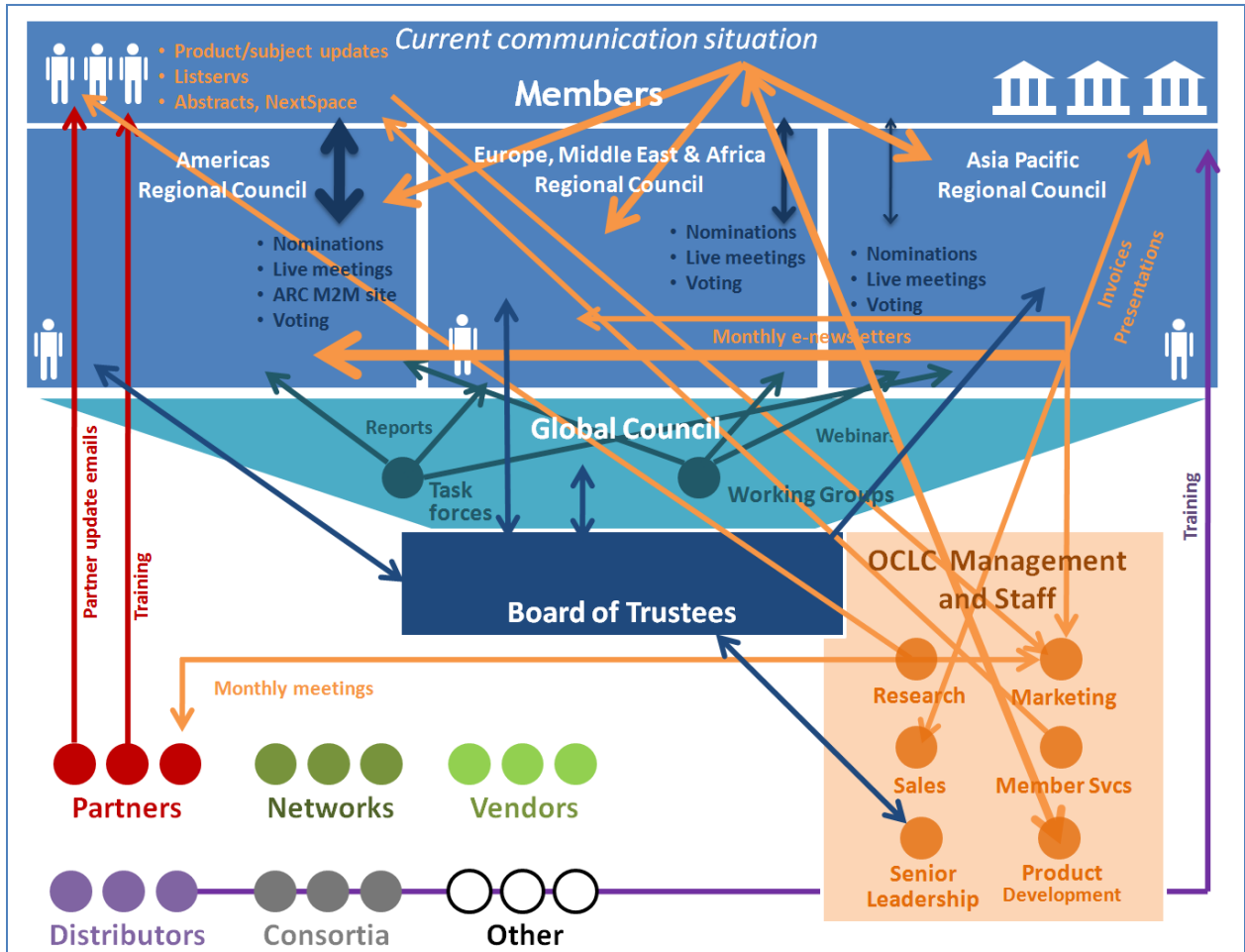
Originally Adopted by Members Council, February 1990

APPENDIX C: Communications Flow Detail

OCLC Communications Grid

From ↓	To →	Members (People)	Members (Institutions)	ARC	EMEARC	APACRC	Global Council	Board of Trustees	OCLC Staff and Management	Partners
Members (People)		<ul style="list-style-type: none"> • Interest groups • ARC M2M site 								
Members (Institutions)			<ul style="list-style-type: none"> • Member stories 							
	ARC	<ul style="list-style-type: none"> • Meetings • Nominations 	<ul style="list-style-type: none"> • Meetings • Voting 	<ul style="list-style-type: none"> • ARC M2M site 						
	EMEARC	<ul style="list-style-type: none"> • Meetings • Nominations 	<ul style="list-style-type: none"> • Meetings • Voting 							
	APACRC	<ul style="list-style-type: none"> • Meetings • Nominations 	<ul style="list-style-type: none"> • Meetings • Voting 							
	Global Council	<ul style="list-style-type: none"> • Task forces • Reports 	<ul style="list-style-type: none"> • Task forces • Reports 	<ul style="list-style-type: none"> • Annual live mtg • Exec comm. reports 	<ul style="list-style-type: none"> • Annual live mtg • Exec comm. reports 	<ul style="list-style-type: none"> • Annual live mtg • Exec comm. reports 	<ul style="list-style-type: none"> • Annual live mtg • Virtual meetings 	<ul style="list-style-type: none"> • Annual report • Elect GC members to BoT 	<ul style="list-style-type: none"> • Task forces • Reports 	
	Board of Trustees		<ul style="list-style-type: none"> • Annual Report letter 	<ul style="list-style-type: none"> • Updates at regional council mtg 	<ul style="list-style-type: none"> • Updates at regional council mtg 	<ul style="list-style-type: none"> • Updates at regional council mtg 	<ul style="list-style-type: none"> • Presentation and Q/A session 	<ul style="list-style-type: none"> • Board meetings • Committee activities 		
	OCLC Staff/Management	<ul style="list-style-type: none"> • NextSpace • Abstracts • Symposia • Listservs • Email updates • Webinars • Training sessions • 1-800 number 	<ul style="list-style-type: none"> • Invoices • GC voting comm 	<ul style="list-style-type: none"> • Monthly eNews • Participation on ARC committees • M2M site 	<ul style="list-style-type: none"> • Monthly eNews 		<ul style="list-style-type: none"> • Annual live mtg • Bi-annual virtual mtg 	<ul style="list-style-type: none"> • Open addresses from board members • Inside OCLC • Inside Scoop • Jay's Mgr Mtgs 	<ul style="list-style-type: none"> • Monthly briefings • Update comm • Project groups 	
	Partners	<ul style="list-style-type: none"> • Pass-along comm • Newsletters 	<ul style="list-style-type: none"> • Invoices 							
	Distributors	<ul style="list-style-type: none"> • Training 								

APPENDIX D: Communications Flow Diagram



APPENDIX E: Communications Analysis by Stakeholder and Topic

Stakeholders	Members	Survey Responses	User Group Meetings	ARC Meetings	eNews
	Regional C.		Member Updates		ARC M2M Site
Global C.		Listsers	Advisory Groups		Symposia
BoT				Global Council Meetings	
OCLC Staff & Mgmt		Annual Report		Board Meetings	
			Abstracts	NextSpace	Research Reports
		Brochures	OCLC.org	@OCLC	Research Updates
		News Releases	Product emails	Coop Blog	Membership Reports
					Above the Fold
		Products Message content relates more to Cooperative			