OCLC Record Use Policy
Discussion

Jennifer Younger
OCLC Global Council Annual Meeting
April 21, 2010
The OCLC Board of Trustees has convened a Record Use Policy Council, which will draw upon the fundamental values of the OCLC cooperative and engage with the global library community to develop the next generation of the WorldCat Record Use Policy. The intent is to recommend to the OCLC Board of Trustees a new policy that is aligned with the present and future information landscape. The new policy will replace the Guidelines for Use and Transfer of OCLC Derived Records that was developed in 1987.

http://www.oclc.org/worldcat/catalog/policy/council
The OCLC Cooperative

- OCLC Members
- OCLC the non-profit corporation
- OCLC Governance Structure - Board of Trustees, Global Council, Regional Councils
Timeline of the Record Use Policy Council

- Policy Council convened Sept 2009
- Produce draft policy January-March 2010
- Submit new draft policy to Board of Trustees for distribution to Global and Regional Councils April 2010
- Incorporate member input April-May 2010
- Submit new proposed policy to Board of Trustees End of May 2010
Translations available:

- Chinese (simplified)
- Chinese (traditional)
- Dutch
- French
- German
- Portuguese
- Spanish

Les membres du Conseil d'OCLC pour la politique d'utilisation des notices ont commencé il y a quelques mois à élaborer la politique d'utilisation de WorldCat de la prochaine génération. Ce projet de document est soumis à l'examen de la communauté.

Ce document n'est pas final, il ne s'agit que d'un projet. Nous serions vraiment très heureux de connaître votre opinion à son sujet d'ici la fin mai. Nous espérons que vous prendrez le temps de l'examiner attentivement et de nous faire savoir ce que vous en pensez. Vous pouvez poster des commentaires sur le forum communautaire, envoyer un mail à recorduser@oclc.org ou vous inscrire pour participer à un webinaire dans le cadre duquel vous aurez la possibilité de poser des questions et de communiquer votre point de vue aux membres du Conseil pour la politique d'utilisation des notices. Nous continuerons à ajouter du contenu à la FAQ jointe au fur et à mesure que nous recevrons des questions de la communauté pendant le processus d'examen.

Nous allons aussi traduire ce projet de document en chinois simplifié et traditionnel, en espagnol, en portugais, en allemand, en néerlandais et en français. Ces traductions seront postées dès qu'elles seront effectuées.

Les droits et responsabilités de WorldCat pour la coopérative OCLC -- Projet soumis à l'examen de la communauté

Historique des révisions et notes

Table des matières

1. Portée, fondement et objectifs de la politique
2. Préambule
   A. OCLC et WorldCat
<table>
<thead>
<tr>
<th>Members of the Record Use Policy Council</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chew Leng Beh</td>
</tr>
<tr>
<td>Raymond Berard</td>
</tr>
<tr>
<td>Karen Calhoun</td>
</tr>
<tr>
<td>Klaus Ceynowa</td>
</tr>
<tr>
<td>Chris Cole</td>
</tr>
<tr>
<td>Lorcan Dempsey</td>
</tr>
<tr>
<td>Nancy Eaton</td>
</tr>
</tbody>
</table>
What does the policy cover?

- Rights and responsibilities of members
- Acceptable use by third parties as agents for members
- OCLC’s responsibilities to members
- Mechanisms for conflict resolution
- Process for collective participation in changing the policy
Other supporting documents

- Frequently asked questions
  http://www.oclc.org/worldcat/catalog/policy/questions/default.htm

- Principles of Cooperation (being updated by Global Council)
  http://www.oclc.org/worldcat/catalog/principles/default.htm

- OCLC public purposes
  http://www.oclc.org/about/purpose/default.htm

- Membership and Governance Protocols
  http://www.oclc.org/membership/membership_protocols.pdf

- Guidelines for contributions to WorldCat
  http://www.oclc.org/worldcat/catalog/guidelines/default.htm
A different approach to this policy

• A code of good practice for members of a cooperative based on shared values, trust and reciprocity in understanding rights and responsibilities

• Focus on member rights and responsibilities instead of detailed provisions or restrictions with the general aim to foster innovation in our ever-changing information landscape

• Members can transfer their data to other libraries, cultural and scientific institutions including OCLC members and OCLC non-members

• Members can transfer their data to their agents acting on their behalf

• Help collaborating organizations to have confidence that they can predictably and reliably build on WorldCat
Focus on the value of the WorldCat database as a whole and its value to members in visibility of holdings, in support for resource sharing and other services without the distinction between original cataloging and WorldCat derived records, or the ownership of individual records as the focus.

- A process for collective, regular review of the policy
- Steps OCLC can take to address inappropriate use by members
- Global Council as an advisory body on how to proceed if no earlier resolution
The WorldCat network value and use

• A bibliographic record supply
• A registry of library holdings
• A discovery environment
• An infrastructure for knowledge organization
• An infrastructure for systemwide maintenance of metadata
• A source of intelligence about the systemwide “collective collection”
The policy’s intent

“To encourage the widespread use of WorldCat bibliographic data while also supporting the ongoing and long-term viability and utility of WorldCat and WorldCat-based services”

• Enable and facilitate innovation
• Maintain a balance between openness and boundaries
Elinor Ostrom

2009 Nobel Memorial Prize in Economic Sciences for "her analysis of economic governance, especially the commons".

By: aschweigert

http://www.flickr.com/photos/aschweigert/4006785934/
What is a ‘code of good practice’?

Centered on the characteristics of robust, enduring commonly held resources:

• Commitment to collective action to build and sustain the shared resource

• Understandable and acceptable boundaries of use

• Community acceptance of self-governing behaviors that manage the use of the shared resource

• Reciprocity, trust, judgment

Purpose of the code of good practice is to sustain the shared resource over time
What are ‘OCLC community norms’?

Laid out in the 1996 Members’ Council document “Principles of Cooperation” (being updated by Global Council)

“We’re in this together”

• Contribute
• Cooperate
• Ensure viability of WorldCat and related services
• Disseminate the Principles of Cooperation to others
Is WorldCat a ‘public good’?

‘Public good’
- Freely available to all without restrictions
- Once available, no feasible way to exclude anyone from the good’s benefits
- Diminishes the incentive to contribute toward the cost of providing the good

‘Membership’ or ‘club’ good
- Shared by a community of stakeholders
- Defines conditions for access to benefits
- Manages the ongoing supply of the good through mechanisms that distribute the cost of providing the good
Collective commitment to sustain the services on which members rely

“As a director of an OCLC Member library I feel a responsibility to ensure the sustainability of the OCLC bibliographic database for the long term if only for selfish long term planning purposes.”
Contact us....

• via email at recorduse@oclc.org

• post to the Council's online community forum at http://community.oclc.org/recorduse/