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.

## Record Use Policy Council Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
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<td>Chew Leng Beh</td>
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<td>Raymond Berard</td>
<td>Barbara Gubbin, co-chair</td>
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<tr>
<td>Karen Calhoun</td>
<td>Clifford Lynch</td>
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<td>Klaus Ceynowa</td>
<td>Brian Schottlaender</td>
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<td>Chris Cole</td>
<td>Lamar Veatch</td>
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<td>Lorcan Dempsey</td>
<td>Jennifer Younger, co-chair</td>
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<td>Nancy Eaton</td>
<td>Larry Alford, Liaison to the OCLC Board of Trustees</td>
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The Charge of the Record Use Policy Council

- Review key values and principles underlying the current *Guidelines* developed in 1987.
- Develop success criteria for a revised policy or guidelines.
- Conduct an environmental scan of data-sharing policies.
- Evaluate new findings from the environmental scan and draft new policy and recommendations for implementation.
- Develop a formal, transparent and well-managed process for vetting the new draft policy with the OCLC Regional Councils and the OCLC Global Council as the representatives of the OCLC membership.
Draft 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
OCLC and WorldCat

- Founded to promote library use and support libraries
- Largest network of shared library content and services
- Built and sustained by OCLC members and OCLC
- Governed by membership and governance protocols
The OCLC Cooperative

• OCLC Members
• OCLC corporation
• OCLC Governance Structure - Board of Trustees, Global Council, Regional Councils
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”
Why do we need a policy?

- Maintain integrity of a shared community resource which benefits the cooperative of OCLC members
- Reinforce the collective commitment to shared values, self-governance and a spirit of reciprocity and trust
- Provide the underpinning for a viable business plan to sustain WorldCat
A different approach for the new policy

• A code of good practices for members of a cooperative based on shared values, trust and reciprocity in understanding rights and responsibilities, not a legally enforceable policy for members.

• 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.

• Separate terms for third parties and their commercial use.
More on the different approach

- Focus on the WorldCat database as a whole and its value to members in visibility of holdings, in support for resource sharing and other services without using 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.

- If unresolved, OCLC will refer the matter to the OCLC Global Council for prompt advice on how to proceed.
What will the policy cover?

- Rights and responsibilities of members
- Acceptable use by third parties as agents for members
- OCLC’s responsibilities to members
- Process for collective participation in changing the policy
Criteria for successful policy implementation

• Clear and accessible language
• Member understanding and commitment
• Support for member needs
• Support innovation and best-in-class services to users
• Clarity around problem resolution
• Reflective of current environment
• Amenable to periodic review and change
Contact us....

• via email at recorduse@oclc.org

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

• attend a webinar; register at http://www.oclc.org/worldcat/catalog/policy/council/