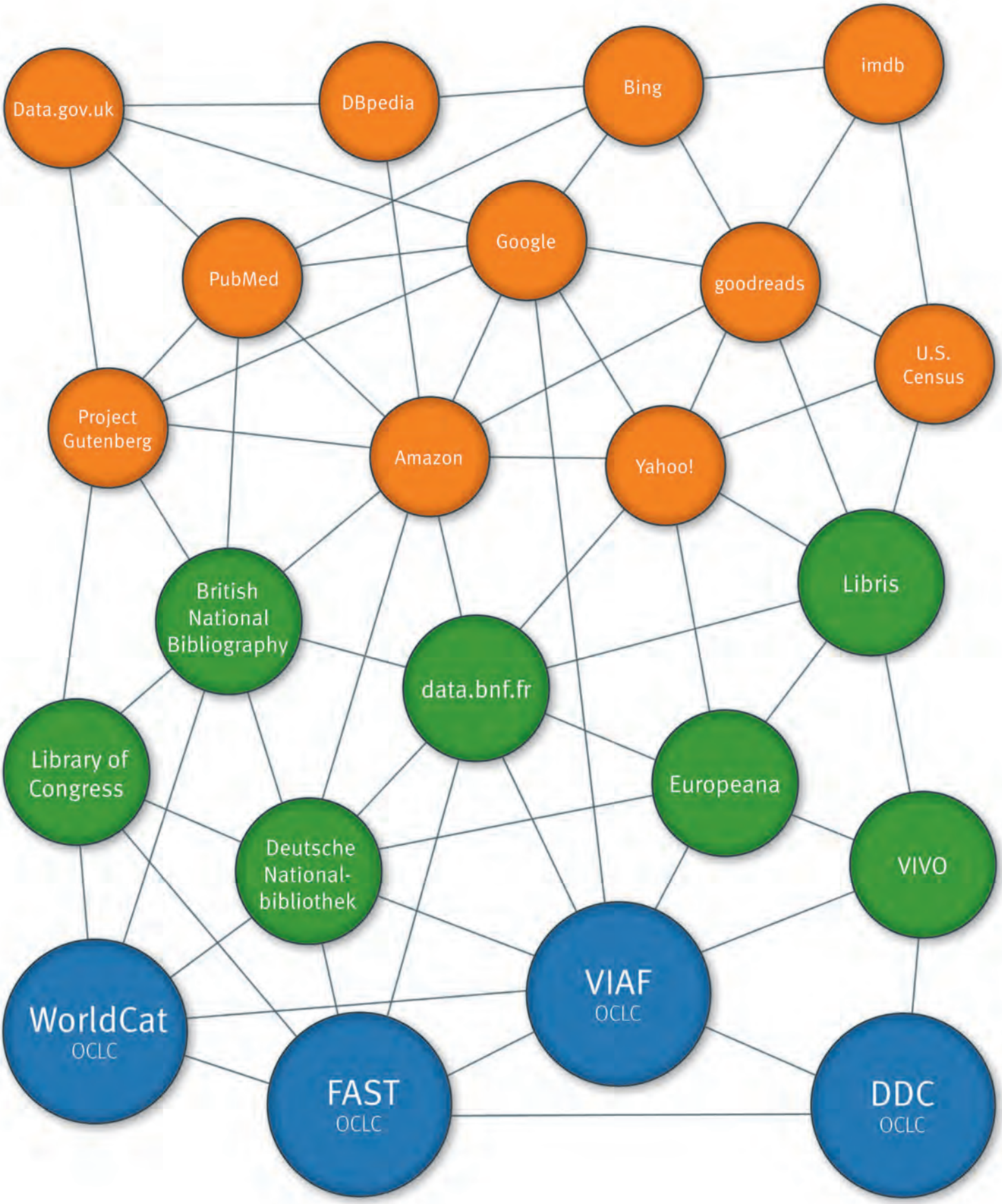
OCLC The world's libraries. Connected.™

Annual Report 2011/2012



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Founded in 1967, OCLC is a nonprofit, membership, computer library service and research organization dedicated to the public purposes of furthering access to the world's information and reducing library costs. Libraries around the world use OCLC services to locate, acquire, catalog, lend, preserve and manage library materials. Researchers, students, faculty, scholars, professional librarians and other information seekers use OCLC services to obtain bibliographic, abstract and full-text information when and where they need it. OCLC and its member libraries cooperatively produce and maintain WorldCat—the OCLC Online Union Catalog.

The Cover—Linked Open Data

Libraries are increasingly exploring linked open data as a way to make their bibliographic records available, for free, on the Internet, so that they can be reused and more fully integrated into the broader Web environment. Linked data is meant for machine-to-machine consumption. The cover illustrates a small portion of the linked open data community that libraries and OCLC are exploring, and this annual report highlights the cooperative's recent advances in this rapidly changing environment.

The cover illustration of linked open data is a remix of a design (File:LOD Cloud Diagram as of September 2011.png) by Anja Jentsch in Wikimedia Commons, available under Creative Commons Attribution-Share Alike 3.0 Unported license.

Connecting people to knowledge through library cooperation

To the Membership

In November 2012, Larry Alford, Chief Librarian, University of Toronto Libraries, will step down as Chair of the OCLC Board of Trustees after five years in that position, and Sandra Yee, Dean, University Library System, Wayne State University, will become the new Chair. This photo of Sandy, Larry and me was taken in the Kilgour Building at OCLC in Dublin, Ohio.

I have the honor of presenting the 2011/2012 OCLC Annual Report to the OCLC membership.

On June 27, 2011, I had announced my plans to retire as President and Chief Executive Officer on June 30, 2012, after 14 years of service. However, at the request of the Board, I have agreed to delay my retirement and remain as President and CEO for an additional year, thereby providing the Board additional time to appoint my successor and complete a smooth transition.

Participation

Libraries around the world continued their strong use of OCLC systems and services and contributed resources to the OCLC cooperative. They used OCLC to:

- catalog 423.9 million items online and via batchload
- add 37.9 million records to the WorldCat database
- arrange 9.2 million interlibrary loans
- perform 58 million end-user reference searches on the OCLC FirstSearch service
- perform 231.3 million click-throughs from partner sites on the Web to the WorldCat.org landing page
- add 21.7 million records to WorldCat for digital objects via the WorldCat Digital Collection Gateway.

WorldCat

In fiscal 2012, WorldCat, the OCLC bibliographic database, grew by 37.9 million records and 117 million location listings. We also batch-processed some 393 million records from member institutions around the world, adding their unique records and holdings to WorldCat.

In the coming year, we are moving WorldCat to a new technological environment using Apache Hadoop and HBase software that will provide new capabilities for member libraries and improved operating efficiencies for OCLC.

Linked Open Data

Linked open data is data that is available under an open license, allowing reuse of the data. Libraries are increasingly exploring linked open data as a way to make their bibliographic records available, for free, on the Internet, so that the records can be reused and more fully integrated into the broader Web environment. At the start of fiscal 2012, OCLC was making the following available as linked data: the Virtual International Authority File (VIAF), Faceted Application of Subject Terminology (FAST) and the Dewey Decimal Classification.

On June 20, 2012, OCLC took a significant step in the world of linked data by starting to add Schema.org descriptive mark-up to WorldCat.org pages. Schema.org is a collaboration among Bing, Google, Yahoo! and Yandex, the Russian search engine, that has created a system model for efficient harvesting of structured data from the Web. Making the entire publicly available version of WorldCat available for use by intelligent Web crawlers like Google and Bing will raise the visibility of library resources and ultimately increase their availability. (See Research on page four). This is indeed an important advance for OCLC members, made possible by experience from previous linked data projects mentioned above.

Members of the OCLC cooperative routinely solicit OCLC's guidance on the use and transfer of WorldCat-derived records, from both licensing and technical perspectives. Consequently, OCLC management researched and experimented with different data licenses on OCLC data projects, and consulted with the OCLC Global Council and library and developer communities. On August 6, 2012, the OCLC Board of Trustees announced that it recommends the Open Data Commons Attribution License (ODC-BY) for member institutions that would like to release their library catalog data containing WorldCat-derived records on the Web. This open data license provides the means for users to share WorldCat-derived data in a manner that is consistent with the cooperative's community norms defined in OCLC's "WorldCat Rights and Responsibilities for the OCLC Cooperative."

On September 4, 2012, Europeana (Europe's digital library, archive and museum) and OCLC announced an agreement whereby OCLC member libraries can contribute WorldCat-derived metadata to the Europeana.eu portal in a manner consistent with "WorldCat Rights and Responsibilities for the OCLC Cooperative."

Additional information about OCLC's commitment to open linked data can be found on pages 16–17.

Representing the Collective Collection

OCLC is extending WorldCat to represent the collective collection of the OCLC cooperative, including physical holdings such as books and journals, licensed digital content and the growing array of special collections that are being digitized (see page 14). We continued to work with libraries, Google and the HathiTrust to derive new MARC records that represent these digital collections based on the rich collection of print records contributed to WorldCat by the OCLC membership over the last 40 years.

Finances

Libraries' use of OCLC services in fiscal 2012 generated cost-recovery revenues of $203.5 million, which was down from $205.6 million the previous year. Contribution to equity before portfolio gains and gains from the sale of product lines (licensed content for FirstSearch) was $610,000, and realized gains brought total contribution to equity to $6.8 million. We continue to have a strong balance sheet and substantial reserves.

Fiscal 2012 revenues included $156.3 million from the Americas (77 percent); $8.6 million from Asia Pacific (4 percent); and $38.6 million from Europe, the Middle East and Africa (19 percent).

During the year, OCLC provided libraries with $22.4 million in credits, primarily for cataloging and resource sharing, to encourage the growth and quality of WorldCat.

In North America, library budgets continued to be stressed in the current economic downturn. Elsewhere, library budgets are projected to be relatively flat to declining. In fiscal 2012, OCLC froze prices in North America for cataloging and resource sharing for the third year in a row. In fiscal 2013, modest price increases of 2–3 percent went into effect on July 1, 2012.

We continued to invest in research and development critical to the future of libraries. We spent $53.6 million on enterprise resource investment (hardware, software and capitalized development labor) for building our new Webscale services as well as enhancing our existing services.

Divestiture

In March 2012, OCLC completed the transfer to EBSCO Publishing (EBSCO) of the rights to license certain publisher-owned databases that were available through the OCLC FirstSearch reference service. As a result, the cooperative is no longer a content reseller. Going forward, OCLC will focus on management of and access to libraries' full collections .

Enhancements to existing services

We continued to invest heavily to maintain and enhance OCLC's existing services, including Connexion, QuestionPoint, CONTENTdm, EZproxy and WorldCat Local. We also released enhancements for the integrated library management systems that OCLC provides to 5,035 libraries in Africa, Australia and Europe: Amlib, Bibliotheca, CBS, LBS, OLIB, SunRise and TouchPoint.

Building Webscale with libraries

In the last three annual reports I have discussed our plans and activities to build Webscale services in the Internet cloud with libraries.

In December 2011, we introduced OCLC WorldShare, a new cloud-based platform and network that will enable library developers, partners and others to create and share applications for libraries and their users. It currently supports acquisitions, circulation and patron management, discovery and delivery, management of e-resources and applications developed by third parties.

Fiscal 2012 was the first full year of production for OCLC WorldShare Management Services (WMS). At June 30, 2012, there were 47 libraries using WMS.

Our strategy for building Webscale encompasses four areas:

- create systemwide efficiencies in library management
- represent the full range of member collections and services where the library user is
- build a global infrastructure that is responsive to local conditions
- advance the future of libraries through research, advocacy and community making.

Let me review our accomplishments in fiscal 2012 in each area.

Create systemwide efficiencies in library management

In March 2012, we began a pilot test with six member libraries that involved outputting MARC records and managing URLs based on collections of e-resources in the WorldCat knowledge base, thereby eliminating the need to create metadata on a record-by-record basis. We released this new collection management functionality in August 2012 as part of OCLC WorldShare Metadata.

We conducted a six-month field test with 20 member libraries of the new OCLC WorldShare Interlibrary Loan service, and in August 2012, began an 18-month phased migration to the new service that will involve some 8,500 libraries. WorldShare Interlibrary Loan is scheduled to replace WorldCat Resource Sharing in 2013 as part of libraries' existing subscriptions. The new service will centralize workflows now managed in multiple systems and provide new functionality that speeds fulfillment of interlibrary loan requests, saving time for library staff and library users.

On April 4, 2012, we transitioned the Virtual International Authority File (VIAF) from an OCLC Research project to an OCLC service through agreement with the participants. VIAF combines multiple name authority files into a single name authority service. OCLC is now exploring ways to get more names into the authority file as well as link VIAF with other data resources. A collaboration involving Wikipedia and VIAF appears on page 32.

Represent the full range of member collections and services where the library user is

As part of the ongoing effort to represent the collective collection mentioned earlier, we loaded 104 new collections comprising more than 143 million records from content providers. These records are accessible through WorldCat.org and WorldCat Local.

The aforementioned WorldCat.org is a website that offers a search box that people can download for free and use to search all records in the WorldCat database from anywhere on the Internet. Referrals to library sites from WorldCat.org increased 25 percent from the previous year, and total referrals since the program began in 2005 have passed the 1 billion mark. (See page 26.)

Build a global infrastructure that is responsive to local conditions

To support our new OCLC WorldShare Management Services, we opened data centers in London, United Kingdom, in November 2011, in Sydney, Australia in March 2012 and in Toronto, Ontario, Canada, in August 2012.

In February 2012, OCLC achieved certification for the International Organization for Standardization (ISO) 27001:2005 Information Security Management System (ISMS) from Lloyd's Register Quality Assurance (LRQA). As we continue to build Webscale with libraries, it is increasingly important that we have robust security processes in place to protect the cooperative's data and privacy information. It is also worth noting that since 1998, OCLC has been registered to ISO 9001, the international standard for quality assurance in design, development, production, installation and servicing.

Advance the future of libraries through research, advocacy and community making

In addition to OCLC's principal objectives of furthering access to the world's information and reducing the rate of rise of library costs, the OCLC charter includes this objective: to promote the evolution of library use, of libraries themselves, and of librarianship. We do this through research, advocacy and community making.

Research

OCLC Research staff work with the library and information community to collaboratively identify problems and opportunities, prototype and test solutions, and share findings through publications, presentations and professional interactions.

In fiscal 2012, OCLC Research staff published 30 reports and articles in publications outside of OCLC, and gave 102 presentations to librarians and information scientists around the world. In addition, they created 12 YouTube videos and produced weekly news and information updates that were distributed through a variety of channels and posted on the OCLC Research website.

OCLC researchers are also recognized leaders and represent community interests to national and international standards bodies. Lynn Silipigni Connaway, OCLC Senior Research Scientist, serves on the Board of Directors of the American Society for Information Science and Technology. Jackie Dooley, OCLC Research Program Officer, is the 2012–2013 President of the Society of American Archivists. Mike Teets, Vice President, Innovation, serves on the Board of Directors of NISO (National Information Standards Organization). Lorcan Dempsey, Vice President, OCLC Research, served as Course Director for the prestigious 2012 Ticer Summer School at Tilburg University, in the Netherlands.

As noted on page two, linked open data has become a much discussed topic in the library community, and OCLC Research has been heavily involved. Researchers participated in the W3C Library Linked Data Incubator Group, whose goal is to help increase global interoperability of library data on the Web. The Innovation Lab was instrumental in implementing Schema.org in the WorldCat environment.

The OCLC Research Library Partnership provides a venue for research institutions to engage with OCLC to work cooperatively on making operational processes more efficient and shaping new scholarly services by directly engaging senior managers. Currently, there are 160 members in the Partnership.

Advocacy and Community Making

OCLC published a series of reports to help librarians stay abreast of issues and trends in librarianship and help them plan for the future. Among the reports issued in fiscal 2012:

- A "Priorities and Perspectives" series for libraries in Germany, the Netherlands, United Kingdom and United States
- *Libraries at Webscale*
- "WorldCat Quality."

In October 2011, the Bill & Melinda Gates Foundation awarded OCLC a grant of $726,000 to continue support for the "Geek the Library" community awareness program, and in October 2012, provided an additional $1.9 million in funding to expand the program. In September 2012, the Gates Foundation provided a $4.1 million grant to OCLC to support five years of ongoing operations of WebJunction, a website that promotes learning for all library staff.

Strategic Alliances

Ex Libris and OCLC agreed to expose WorldCat content via the WorldCat Search API incorporated in Ex Libris discovery and delivery services.

We established a partnership with Sustainable Collection Services to use WorldCat for collection analytics that will help libraries manage their print collections.

EBSCO Publishing is making its EBSCO Discovery Service™ (EDS) interoperable with OCLC WorldShare Management Services, thereby enabling libraries that use EDS to perform cataloging, acquisitions, license management and circulation in OCLC's next-generation, cloud-based management system, while providing their patrons with the EDS discovery service as a user front end.

Workplace

In 2012, for the seventh straight year, OCLC was named one of *ComputerWorld*'s "Best Places to Work in Information Technology" in the U.S.

For the fourth year in a row, OCLC was named among the Best Employers in Ohio by the Society for Human Resource Management State Council.

OCLC also was honored with the 2012 Alfred P. Sloan Award for Excellence in Workplace Effectiveness and Flexibility for its use of flextime, part-time work and compressed workweeks as an effective workplace strategy to increase business and employee success. This is the second year in a row that OCLC has received this award.

Governance

OCLC is member-owned and -governed, and management works closely with the Board of Trustees and OCLC Global and Regional Councils. During the year, they provided valuable guidance and support.

Member librarians turned out in strength for Regional Council meetings in Birmingham, United Kingdom; Taipei, Taiwan; and Anaheim, California, USA.

At the November 2011 Global Council meeting, OCLC management previewed the new OCLC WorldShare Management Services infrastructure and brand before its launch in January 2012. As noted above, the Global Council was closely involved in discussions about the rights and responsibilities of OCLC members in making their WorldCat records available on the Web and in collaborative projects involving linked open data.

In November 2011, the OCLC Board of Trustees elected Cindy Hilsheimer, Managing Principal of BeecherHill, an executive search firm, to the OCLC Board. In April 2012, the Global Council elected two members of the OCLC Board of Trustees: Loretta Parham, CEO and Director of the Atlanta University Center Robert W. Woodruff Library; and Jennifer Younger, Executive Director, Catholic Research Resources Alliance, and Edward H. Arnold Director of Hesburgh Libraries Emerita, University of Notre Dame.

I would like to thank the following trustees who will go off the Board in November: Bruce Newell, retired Director, Montana Library Network; Elisabeth Niggemann, Director General, Deutsche Nationalbibliothek; and Lizabeth (Betsy) Wilson, Dean of University Libraries, University of Washington. As I have noted on many occasions, the OCLC cooperative is indeed fortunate to have passionate, capable and committed leaders serving on the Global Council and Board of Trustees.

Looking Forward

Libraries and OCLC continue to make WorldCat ever more useful for information seekers around the world. Working together, we are making significant progress on our new WorldShare Management Services that will improve library workflows and services to users. It has been an honor for me to extend my service and continue to engage with the OCLC membership and staff on these transformational activities.

Jay Jordan
President and Chief Executive Officer
November 2, 2012

Year in Review

A member of the OCLC cooperative is any library, archive or museum that contractually agrees to contribute intellectual content to the OCLC cooperative or share resources with it. A member can participate in governance of the OCLC cooperative through one of three Regional Councils: OCLC Asia Pacific; OCLC Europe, the Middle East and Africa (EMEA); or OCLC the Americas. The Regional Councils send Member Delegates to the OCLC Global Council, which in turn elects six members of the OCLC Board of Trustees.

22,599 OCLC Members

Other **204**

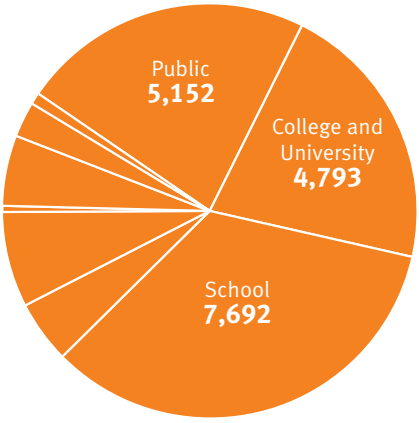
Foundations and Associations **624**

Corporate and Business **1,241**

State and National Libraries **108**

Federal, State and Municipal Government **1,683**

Community College and Vocational **1,102**

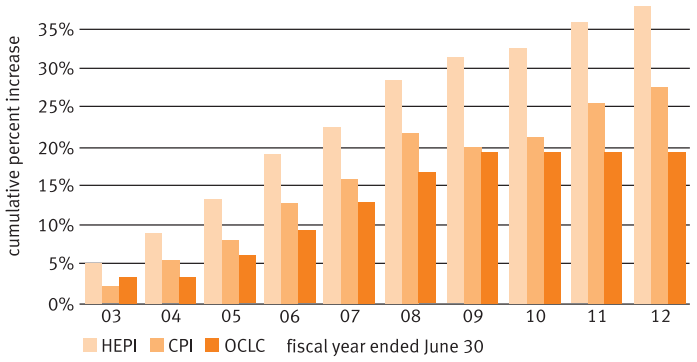


Program Highlights	2011/12	2010/11
Participating libraries (includes active and inactive symbols)	74,029	71,528
Total number of records in WorldCat (after duplicate detection and resolution)	273.7 million	235.8 million
Books and other materials cataloged online	30.9 million	30.2 million
Books and other materials cataloged by batchloading processes	393.0 million	419.7 million
Cataloging records added to WorldCat	37.9 million	38.9 million
Duplicate records removed from WorldCat through the Duplicate Detection and Resolution Program Total records removed since 1991	 2.1 million 11.6 million	 4.9 million 9.5 million
Catalog records generated on computer tape or by FTP for subscribers	4.7 million	4.7 million
Number of records exported online from WorldCat to local systems	56.9 million	62.3 million
Custom-printed catalog cards ordered	945,583	1.2 million
Location listings in WorldCat for library materials	1.85 billion	1.74 billion
Local holdings records	43.8 million	29.4 million
Online interlibrary loans transacted	9.2 million	9.6 million
OCLC ILL Fee Management service participants Transactions ILL charges transferred	2,877 898,781 $13.9 million	2,862 916,781 $14.2 million
OCLC Contract Cataloging (includes LTS)	93 institutions 227,679 records 67 languages	123 institutions 234,701 records 87 languages
Collection Development—Language Sets (discontinued January 2012)	14 institutions 3,143 records 20 languages	132 institutions 29,036 records 20 languages
Collection Analysis subscribers analyses/comparisons run	506 2,321	268 2,518
OCLC FirstSearch authorizations	29,938	36,319
OCLC FirstSearch searches	58.0 million	58.0 million

Financial Highlights

	2011/12	2010/11
Revenues	$ 203,469,300	$ 205,618,900
Operating Results before Portfolio Gains/(Losses) and Other Gains	$ 610,000	$ (1,690,400)
Excess of Revenues Over Expenses	$ 6,835,700	$ 11,091,900
Total Corporate Equity/Net Worth	$ 236,683,700	$ 239,662,300
Total Assets	$ 369,813,100	$ 385,687,800
Current Ratio	2.7:1	2.8:1
Long-Term Debt/Corporate Equity	0.13	0.16

Percent Change in HEPI, CPI and OCLC Cost Sharing



HEPI: Higher Education Price Index. CPI: Consumer Price Index for All Urban Consumers & All Items. Base year 2002. OCLC calculations are based on Online Cataloging and Resource Sharing services.

Program Highlights *continued*	2011/12	2010/11
Referrals from partner sites to WorldCat.org landing page	231.3 million	160.7 million
Click-throughs from WorldCat.org to library services	11.0 million	8.8 million
Click-throughs to information from FirstSearch	8.7 million	10.6 million
Dewey Decimal Classification and Relative Index, Edition 23—copies sold (published April 2011)	3,261	3,379
Abridged Dewey Decimal Classification and Relative Index, Edition 15—copies sold (published February 2012)	925	n/a
WebDewey (subscriptions)	2,199	1,137
Abridged WebDewey (subscriptions)	190	123
OCLC CatExpress service subscriptions	1,552	1,614
QuestionPoint libraries	1,463	1,931
Global Knowledge Base	25,909 records	24,633 records
Countries	33	33
Questions asked	393,086	537,752
Chat sessions	493,285	590,010
Total questions asked (since June 2002)	4.1 million	3.7 million
Total chat sessions (since June 2002)	3.6 million	3.1 million
Total transactions	7.7 million	6.8 million
CONTENTdm licenses	948	874
Total records harvested via the Gateway	21.7 million	12.4 million
Organizations that have contributed records via the Gateway	1,279	1,009
Integrated library systems (Amlib, Bibliotheca, LBS4, OLIB, SunRise)	5,035	5,035
CBS metadata management systems	16	16
WorldCat knowledge base of e-content		
Libraries	400	356
Records	11.7 million	7.6 million
Holdings	196 million	24.6 million
Webscale Management Services (renamed OCLC WorldShare Management Services November 2011)	47 libraries	15 libraries
WorldCat Local sites	1,537	1,505

Year in Review

July 2011

- OCLC Research and Research Libraries UK (RLUK) to survey special collections, archives in UK and Ireland
- OCLC releases membership report, *Seeking Synchronicity: Revelations and Recommendations for Virtual Reference*
- Credo Reference to integrate WorldCat Search API into Credo General Reference Service
- EZproxy 5.4.1 authentication and access software becomes available

August 2011

- WebDewey 2.0 is launched
- OCLC offers Atlas Systems' free electronic document delivery software for ILLiad users
- 40th anniversary of the start of WorldCat and online shared cataloging on August 26

September 2011

- OCLC publishes white paper on "WorldCat Quality"
- HathiTrust full-text index to be integrated into OCLC services, making its content easily discoverable
- E-books from Ingram's MyiLibrary become available for short-term access through WorldCat Resource Sharing
- Ex Libris, OCLC announce partnership to expose WorldCat content via WorldCat Search API incorporated in Ex Libris discovery and delivery services
- OhioLINK and OCLC Research release report on book usage patterns in academic libraries

Members of the eGranth Project Team stand in front of the Central Library of The Indian Agriculture Research Institute (IARI), located in New Delhi, India. Pictured are librarians and research scientists from the 12 institutions involved in the project. Their institutions have contributed more than 500,000 records to WorldCat in the last two years.

Front row, left to right: Mr. Suneel D.M., Research Associate, UAS, Bengaluru; Mr. Sidhartha Gupta, Research Associate, IVRI, Izatnagar; Mrs. Madhu Bala, Assistant Librarian, IARI, New Delhi; Mrs. Usha Khemchandani, Librarian In Charge, IARI, New Delhi; Dr. AK Jain, Principal Scientist, IARI, New Delhi; Dr. H Chandrasekaran, Principal Scientist & Head, USI, IARI, New Delhi; Mrs. Suneeta Gupta, Assistant Librarian, IARI, New Delhi; Dr. K Veeranjaneyulu, University Librarian, ANGRAU, Hyderabad.

Back row, left to right: Mr. Parwej Ahmed, Senior Research Fellow, IARI, New Delhi; Mr. Dipak Dinkar, Research Associate, IARI, New Delhi; Mr. Jagdish Kumar Kanojia, Technical Officer, IARI, New Delhi; Mr. KN Khandpal, Assistant Librarian, IVRI, Izatnagar; Mr. Rajiv Pateria, Assistant Librarian, CCSHAU, Hisar; Dr. Rajesh Bhardwaj, Senior Scientist, IARI, New Delhi; Mr. SK Jha, Project Manager, eGranth-Digital Repository, HCL, New Delhi.

October 2011

- Society of American Archivists endorses OCLC Research framework for putting unpublished digital materials online
- Bill & Melinda Gates Foundation provides additional $726,000 in funds for OCLC's "Geek the Library" community awareness program
- Institute of Museum and Library Services awards grant to Rutgers University and OCLC Research to further collaborative study of virtual reference services
- WorldCat Local provides searching of local holdings records attached to WorldCat bibliographic records
- In South Africa, Sabinet makes WorldCat Local available to the National Library of South Africa and 15 academic institutions for resource discovery and delivery
- CONTENTdm 6.1 released

November 2011

- Institute of Museum and Library Services awards grant of $250,000 to WebJunction to help communities get on the path to digital inclusion
- QuestionPoint virtual reference service receives 7 millionth question
- King Abdulaziz Public Library in Saudi Arabia to make 1.2 million Arabic-language records available through WorldCat.org
- OCLC begins hosting on a CBS system in Leiden, the Netherlands, the International Standard Name Identifier (ISNI) database, which contains information on authors, actors, publishers, researchers and performers

December 2011

- OCLC releases Faceted Application of Subject Terminology (FAST) as linked data
- OCLC introduces OCLC WorldShare, a new platform that will enable library developers, partners and others to create, configure and share applications for libraries and their users

The Asia Pacific Regional Council met in Taipei, Taiwan on October 17–18, 2011, with 146 participants from 15 countries.

On November 8, 2011, the OCLC Board of Trustees elected Cindy Hilsheimer, Managing Principal of BeecherHill, an executive search firm, to the OCLC Board.

The King Abdulaziz Public Library made 1.2 million Arabic-language bibliographic records available in WorldCat.org. The records contain brief bibliographic information for items held by Arabic Union Catalogue members' libraries with links to the AUC's union catalog.
الموحد العـربي الفهـرس

Librarians from many countries in the Arabic-speaking region attend training sessions at the Center for Arabic Union Catalogue, in Riyadh, Saudi Arabia.
الموحد العـربي الفهـرس مركز

Year in Review

January 2012

- OCLC introduces OCLC WorldShare License Manager service, which combines the WorldCat knowledge base with linking technology for electronic resource management
- University of Delaware is first ARL institution to acquire OCLC WorldShare Management Services
- Article Exchange is integrated into WorldCat Resource Sharing service
- e-Resource Advisory Council is established to assist OCLC in developing e-resource strategy
- OCLC establishes partnership with Sustainable Collection Services to use WorldCat data for collection analytics
- APIs for acquisitions, circulation, collection management, vendor information and NCIP become available through OCLC WorldShare Platform
- The OCLC Americas Regional Council meets in Dallas, Texas, on January 20, in conjunction with the ALA Midwinter Meeting

February 2012

- ALISE and OCLC Research award research grants to Abdulhussain Mahdi, PhD, and Arash Joorabchi, PhD, Department of Electronic and Computer Engineering, University of Limerick; Laura Saunders, PhD, and Mary Wilkins Jordan, PhD, Simmons College Graduate School of Library and Information Science; Carolyn Han, PhD, School of Information Studies, McGill University; and Cassity Sugimoto, PhD, School of Library and Information Science, Indiana University Bloomington
- China Academic Library and Information System (CALIS) adds 500,000 records for Chinese publications to WorldCat
- Dewey Abridged Edition 15 published

March 2012

- OCLC achieves certification to ISO 27001, an international benchmark and standard for information security management
- Bibliotheek.nl in the Netherlands to include complete collections of Dutch public libraries in WorldCat
- Relais International to use WorldCat Search and Resource Sharing APIs
- OCLC opens new data center in Sydney, Australia

Libraries at Webscale presents an overview of the opportunities and challenges of operating in a Web-connected world.

The 2012 class of Jay Jordan IFLA/OCLC Early Career Development Fellows, from left to right: Ngozi Ukachi, Librarian II/Cataloguer, University of Lagos, Lagos, Nigeria; Tanzela Shaukat, Librarian, National Disaster Management Authority, Islamabad, Pakistan; Md. Shafiur Rahman, Information Officer, ICDDR,B, Dhaka, Bangladesh; Efua Ayiah, Assistant Librarian, University of Education, Winneba, Ghana; and Gladys Mungai, Assistant Librarian, KIPPRA, Nairobi, Kenya. The program provides continuing education for library and information professionals from countries with developing economies.

April 2012

- CIPE Italian University Consortium to add 11 million records to WorldCat
- OCLC and 22 national libraries and agencies in 19 countries begin transition of Virtual International Authority File from OCLC Research project to service
- New Connexion client incorporates Classify and additional RDA support
- Credo Topic Pages to be enhanced with WorldCat data and customized library holdings
- OCLC Global Council meets in Dublin, Ohio, USA, April 16–18

May 2012

- OCLC/*Library Journal* free online symposium, "Made in a Library," draws 666 participants on May 15
- Version 5.6 of EZproxy authentication service becomes available

June 2012

- Eight libraries in Australia begin pilot projects to implement OCLC WorldShare Management Services
- OCLC begins adding linked data to WorldCat by appending Schema.org descriptive mark-up to WorldCat.org pages, thereby making OCLC member library data available for use by intelligent Web crawlers such as Google and Bing
- EBSCO and OCLC develop partnership to offer interoperability of services for libraries and increased options for discovery

The EMEA (Europe, Middle East and Africa) Regional Council meeting was held in Birmingham, United Kingdom, February 28–29, 2012, with 260 people attending from 21 countries.

On April 18, 2012, the OCLC Global Council elected two members to the OCLC Board of Trustees: Loretta Parham, CEO and Director of the Atlanta University Center Robert W. Woodruff Library; and Jennifer Younger, Executive Director, Catholic Research Resources Alliance, and Edward H. Arnold Director of Hesburgh Libraries Emerita, University of Notre Dame. They will join the Board in November 2012.

In addition to 230 in-person attendees at the Americas Regional Council meeting on June 22, 2012, in Anaheim, California, USA, another 384 persons attended virtually.

Year in Review

WorldCat is a database of bibliographic information built continuously by libraries around the world and OCLC since 1971. Each record in the WorldCat database contains a bibliographic description of a single item or work and a list of institutions that hold the item. The institutions share these records, using them to create local catalogs, arrange interlibrary loans and conduct reference work. Libraries contribute records for items not found in WorldCat using the OCLC shared cataloging system.

As of June 30, 2012, more than 273 million records had been added to WorldCat, spanning six millennia of recorded knowledge, from about 4800 B.C. to the present. This unique store of information encompasses records in eight formats—books, serials, sound recordings, musical scores, maps, visual materials, mixed materials and computer files. Like the knowledge it describes, WorldCat grows steadily. A new record enters WorldCat every 1.2 seconds.

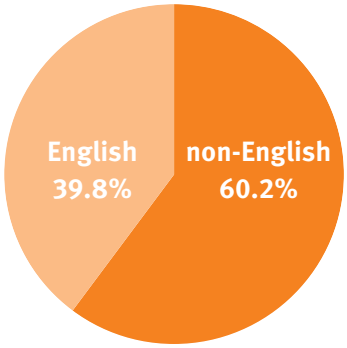
In fiscal 2012, WorldCat grew by 37.9 million records. Libraries used WorldCat to catalog and set holdings for 423.9 million items and arrange 9.2 million interlibrary loan transactions. OCLC FirstSearch service users accessed WorldCat to conduct 35.6 million reference searches.

Records by Format

Format	Total LC Records	Total Participant-input	Total LC-created Participant-input	Total Records
Books	8,217,545	203,013,332	1,765,325	212,996,202
Continuing Resources Format (Serials)	667,064	9,901,938	54,010	10,623,012
Visual Materials	210,664	10,094,313	20,208	10,325,185
Maps	292,752	3,711,271	8,748	4,012,771
Mixed Materials	49,166	12,179,364	4,001	12,232,531
Sound Recordings	346,800	10,975,135	64,418	11,386,353
Scores	103,132	5,962,365	56,888	6,122,385
Computer Files	9,636	5,992,918	2,849	6,005,403
Totals	9,896,759	261,830,636	1,976,447	273,703,842*

* Reflects total unique records after duplicate detection resolution is complete.

Multilingual Composition of WorldCat



273.7 million records

As of June 30, 2012

WorldCat Statistics

As of June 30, 2012

Languages	485
E-books	16,419,144
Works	176,302,014
Manifestations (records)	273,703,842
Total holdings	1,854,243,605

Date Ranges of Records

4800 B.C.–1 B.C.	85,049
1 A.D.–1449	55,253
1450–1499	114,396
1500–1599	1,337,827
1600–1699	3,276,151
1700–1799	6,488,585
1800–1899	19,767,812
1900–1909	5,201,919
1910–1919	5,485,178
1920–1929	6,551,770
1930–1939	7,360,535
1940–1949	6,441,454
1950–1959	10,166,723
1960–1969	17,051,844
1970–1979	24,068,065
1980–1989	30,010,110
1990–1999	37,018,071
2000–2009	42,089,814
2010–	4,841,185

Top 10 Lenders

Fiscal 2012

Organization	Items Lent
Minitex	58,675
University of Chicago	50,910
University of Wisconsin–Madison	43,984
University of Texas at Austin	41,999
University of Michigan	39,456
Baylor University	38,655
Indiana University	38,558
University of North Carolina at Chapel Hill	35,869
University of Iowa	34,901
The Ohio State University	34,862

Top 10 Original Catalogers

Fiscal 2012

Organization	Records Added
University of Hong Kong	77,849
Godfrey Memorial Library	69,957
National Central Library (Taiwan)	62,825
Mahatma Phule Krishi Vidyapeeth (India)	28,922
National Dairy Research Institute (India)	24,735
University of Illinois at Urbana–Champaign	22,451
National Library Board Singapore	22,065
Bayerische Staatsbibliothek (Germany)	20,542
U.S. Government Printing Office	17,310
University of California, San Diego	15,736

Growth of Location Listings

Location listings are attached to each record to identify libraries that hold the item.

Top 50 Languages Distribution

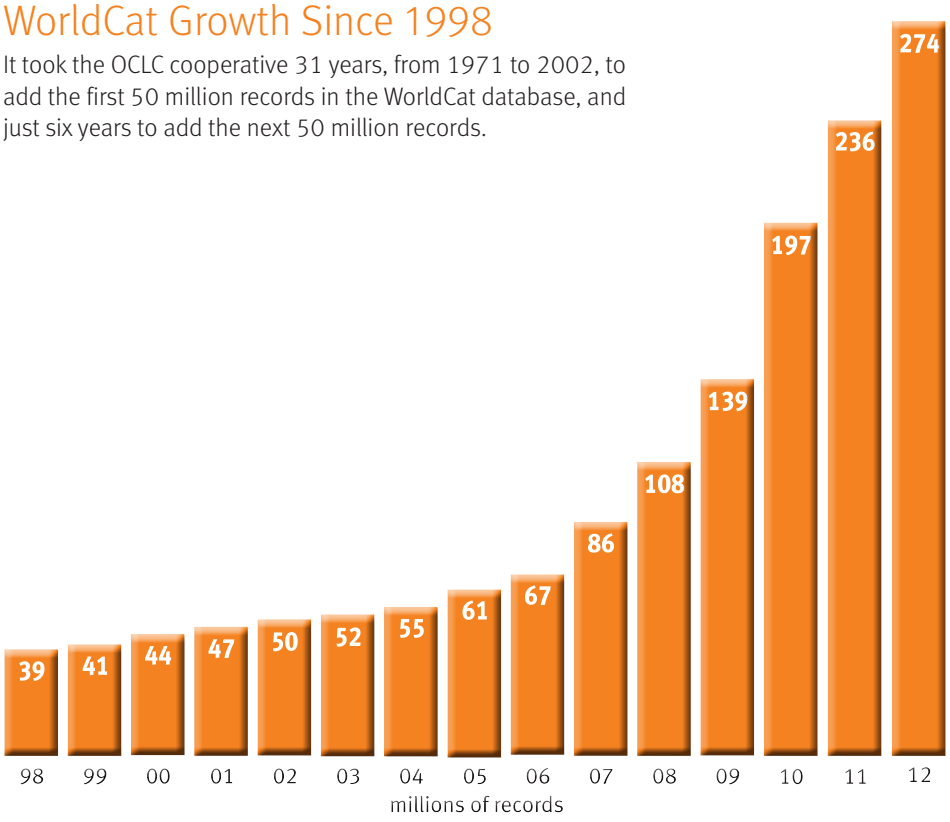
	Records		Records		Records
English	108,632,765	Czech	1,348,247	Vietnamese	238,560
German	36,514,576	Norwegian (Bokmål)	1,129,175	Bulgarian	235,765
French	25,529,995	Finnish	817,603	Yiddish	213,657
Spanish	11,265,217	Indonesian	513,732	Tamil	206,211
Japanese	7,970,406	Catalan	512,222	Frisian	196,908
Chinese	6,475,192	Korean	501,317	Afrikaans	188,892
Italian	4,692,046	Turkish	439,894	Urdu	188,745
Dutch	4,318,856	Norwegian	435,814	Greek, Ancient (to 1453)	152,139
Russian	3,587,711	Hungarian	435,624	Slovak	126,358
Latin	3,536,614	Thai	412,825	Malay	119,248
Danish	2,569,994	Croatian	411,384	Bengali	115,395
Swedish	2,369,778	Greek, Modern (1453–)	366,366	Norwegian (Nynorsk)	92,985
Portuguese	2,111,972	Serbian	337,116	Sanskrit	86,251
Polish	1,835,110	Persian	289,729	Icelandic	84,465
Slovenian	1,767,369	Romanian	264,055	Welsh	79,017
Hebrew	1,689,812	Ukrainian	256,585	Armenian	76,613
Arabic	1,364,392	Hindi	248,935		

As of June 30, 2012

Year in Review

WorldCat Growth Since 1998

It took the OCLC cooperative 31 years, from 1971 to 2002, to add the first 50 million records in the WorldCat database, and just six years to add the next 50 million records.



WorldCat Community Maintenance

OCLC member libraries voluntarily improve and upgrade WorldCat master bibliographic records in the ongoing quality programs listed below.

	FY12	FY11
Expert Community	296,763	304,759
Database Enrichment	233,628	235,533
Minimal-Level Upgrade	212,427	194,634
Enhance Regular	143,911	155,713
Enhance National	46,976	47,876
CONSER Authentication	13,412	21,208
CONSER Maintenance	56,992	57,917
TOTAL	1,004,109	1,017,640

The Collective Collection

OCLC is extending WorldCat to represent the collective collection of the OCLC cooperative, including physical holdings such as books and journals, licensed digital content and the growing array of local content that is being digitized. Records in the collective collection are accessible through the WorldCat.org and WorldCat Local services.

Physical holdings in WorldCat

273.7 million bibliographic records
1.85 billion holdings

Licensed digital content in library collections

707 million electronic database records

Digitized local library content

30 million items (institutional repositories, Google, HathiTrust, OAIster)

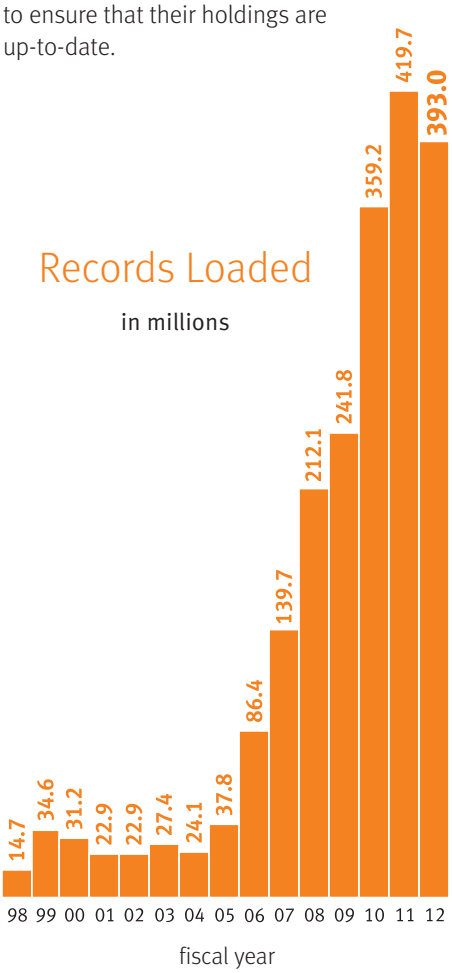
As of June 30, 2012

Batchloading Review

OCLC processed 393 million records via batchload in fiscal 2012. The batchload projects listed here are of several types:

- Retrospective—a one-time load for new members
- Ongoing
- Reclamation—reconcile holdings in local catalog with WorldCat
- Library groups
- Local data

OCLC continues to make significant technological enhancements and workflow improvements to its batchloading processes to accommodate the loading into WorldCat of large files from national libraries and government agencies. Libraries that adopt WorldCat Local also run batchload projects to ensure that their holdings are up-to-date.



Major Batchloads in Fiscal 2012

Institution Name	Holdings Set	Records Processed	Originals Added
Danish Union Catalog and Danish National Bibliography	30,216,334	26,601,716	1,660,275
Bibliothèque nationale de France	15,026,354	14,558,386	3,480,448
UnityUK Live	14,699,450	129,986,979	85,271
University of California, Berkeley	13,900,990	11,450,995	6,231,423
Die Deutsche Nationalbibliothek	12,106,174	11,685,832	107,805
British Library Group Batchload	6,622,116	7,195,619	1,600,959
BIBSYS Group Batchload	6,399,363	529,415	5,844,694
National Library of New Zealand	4,006,212	3,745,822	155,118
University of California, Irvine	3,804,728	1,133,271	611,536
Ebrary Group Batchload	3,710,985	15,069,364	—
Biblioteca Nacional de España	3,575,404	2,700,597	462,686
Stanford University Library	3,547,427	3,384,930	292,958
ABES (l'Agence Bibliographique de l'Enseignement Supérieur)	3,392,867	19,160,384	309,197
University of Michigan Library	3,183,865	767,354	437,348
Baltimore County Public Library	2,911,086	2,834,870	13,022
Harvard University, Office for Information Systems	2,878,314	2,696,705	343,964
Illinois Virtual Catalog	2,733,855	2,349,751	—
Cornell University	2,677,876	1,424,972	639,095
University of Maine	2,300,977	2,727,268	2,044
Gemeinsamen Bibliotheksverbundes	2,168,748	954,369	499,255
Bowdoin College	1,917,996	1,248,945	105
NUKAT Union Catalog of Polish Libraries	1,902,273	1,897,815	1,408,395
University of California, Riverside	1,880,677	366,853	12,156
North American Libraries Group Batchload	1,850,985	1,850,985	—
University of Central Florida	1,837,119	1,591,262	—
University of Alberta	1,747,179	2,932,370	24,772
Montana Shared Catalog	1,710,035	3,074,466	—
Florida Atlantic University	1,688,156	1,363,934	—
University of Washington Libraries	1,631,070	486,599	256,607
Bibliotheks Verbund Bayern (BVB)	1,549,923	4,716,199	266,733
Bibliotheksserv Zentrum Baden-Württemberg	1,521,726	2,195,155	400,685
Cleveland State University Library	1,471,678	1,237,419	14,486
Claremont Colleges	1,362,933	1,290,399	5,291
New York University, Group Batchload	1,128,342	1,270,958	257,091
GGC Group Interactive Update (Dutch Union Catalogue)	1,127,605	1,868,425	—
Texas Tech University	1,117,566	1,016,559	3,294
Big Country Library System	1,113,758	872,028	28,240
Library of Congress	1,093,294	1,034,298	185,228
Missouri University of Science and Technology	1,077,597	1,075,830	—
Harrington Library Consortium	1,035,367	1,162,230	5,635
National Library of Scotland	1,033,075	964,236	157,376
Université du Québec à Montréal	1,019,541	965,635	395,430
University of Windsor, Leddy Library	1,006,897	813,777	—

OCLC is generating new connections for users with linked open data

An increasingly important aspect of modern library services involves migrating data from library system environments into an open, global pool of shared data. This will require that library metadata work well with nonlibrary datasets and vice versa.

Linked open data provides a way for computer programs to more easily access, use and remix data using Web standards such as Hypertext Transfer Protocol (HTTP), Hypertext Markup Language (HTML) and Universal Resource Identifier (URI). Machine-to-machine interactions will provide library users with a dramatic new level of access to information on the Web.

OCLC's linked open data resources include:

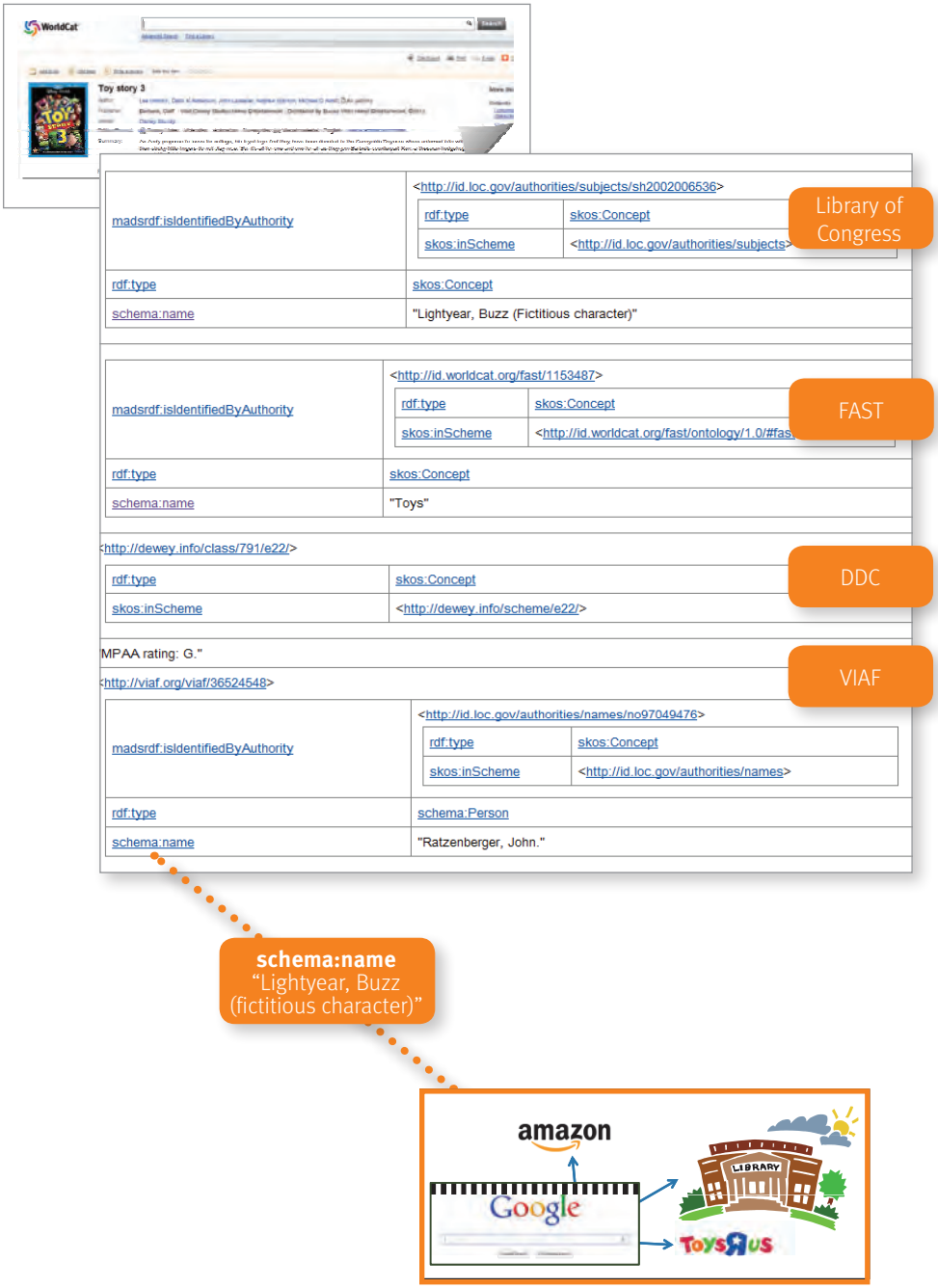
- **Faceted Application of Subject Terminology (FAST)**—an enumerative, faceted subject heading schema derived from the Library of Congress Subject Headings (LCSH), created through a multiyear collaboration of OCLC Research and the Library of Congress to make the rich LCSH vocabulary available as a post-coordinate system in a Web environment (available under the Open Data Commons Attribution License)
- **Dewey Decimal Classification (DDC)**—a full set of more than 23,000 assignable numbers and captions in English, available at the dewey.info experimental space for linked DDC data; the dewey.info prototype is intended to be a platform for Dewey data on the Web
- **Virtual International Authority File (VIAF)**—combines multiple name authority files from 22 national libraries and agencies from 19 countries into a single name authority service
- **WorldCat.org/Schema.org**—the entire WorldCat cataloging collection made publicly available using Schema.org mark-up with library extensions for use by developers and search partners such as Bing, Google, Yahoo! and Yandex
- **Most widely held works in WorldCat**—1.2 million records, each with more than 250 holdings attached, are available for the wider linked data community of commercial providers, retail organizations, researchers and scholars to include in their workflows

World-renowned collections of libraries and other cultural heritage institutions are becoming available as linked open data.

WorldCat.org/Schema.org

Schema.org is a collaboration among Bing, Google, Yahoo! and Yandex, the Russian search engine. It is an agreed-upon system model for efficient harvesting of structured data from the Web.

OCLC is now adding linked data to WorldCat by appending Schema.org descriptive mark-up to WorldCat.org pages. Thus, the entire publicly available version of WorldCat is now available for use by intelligent Web crawlers such as Google and Bing, and they can make use of this metadata in search indexes and other applications. This will raise the visibility of library resources and ultimately increase their availability.



"We are focusing our efforts on getting WorldCat data into accessible forms for local experimentation and development in order to promote libraries as a trusted hub for linked data. Designing and generating linked data requires many vocabulary and modeling choices, and we want to get as much input and commentary from the library community as possible."

—Mike Teets
Vice President, Innovation, OCLC

OCLC's strategy: work collaboratively with libraries to build Webscale services in a cloud computing environment

Webscale brings librarians, library systems and library data together in the computing cloud to provide global reach and local touch for library users.

OCLC's Webscale strategy brings the values of librarianship—cooperation, resource sharing and public service—to the rapidly changing digital world. The goal is to maximize the exposure of library services and collections—including e-books, journals, articles, databases and digital materials—through improved discovery, delivery and metadata syndication, while reducing the costs of acquiring, managing and analyzing the use of these collections.

Key components of OCLC's Webscale strategy are:

- Create systemwide efficiencies in library management
- Represent the full range of member collections and services where the library user is
- Build a global infrastructure that is responsive to local conditions
- Advance the future of libraries through research, advocacy and community making

Create systemwide efficiencies in library management

OCLC WorldShare Management Services at the University of Delaware Library

For several years now, Gregg A. Silvis, Associate University Librarian for Information Technology and Digital Initiatives, University of Delaware Library, has been concerned about the numerous ways in which libraries have duplicated efforts. When OCLC introduced WorldShare Management Services, he saw a solution that the University of Delaware Library—and the entire library community—could use collaboratively in the cloud to streamline operations, remove redundancy and better serve users.

"OCLC's WorldShare solution represents transformative change and a fundamental shift in library operations," says Mr. Silvis. "Libraries have been working toward this type of solution for years. Taking routine library functions to the network will eliminate local system maintenance and upgrades as well as reduce the duplication of loading and indexing records.

"More importantly, though," he says, "it will allow our library staffs, which have been doing very much the same things, to be redeployed to meet other needs as we move forward."

The path to WorldShare Management Services began in August 2008, when the library implemented WorldCat Local, OCLC's Webscale discovery solution.

"We wanted to improve the discovery experience for our users by merging our content silos and, to whatever extent possible, bringing those resources together in one easily searchable place," says Mr. Silvis.

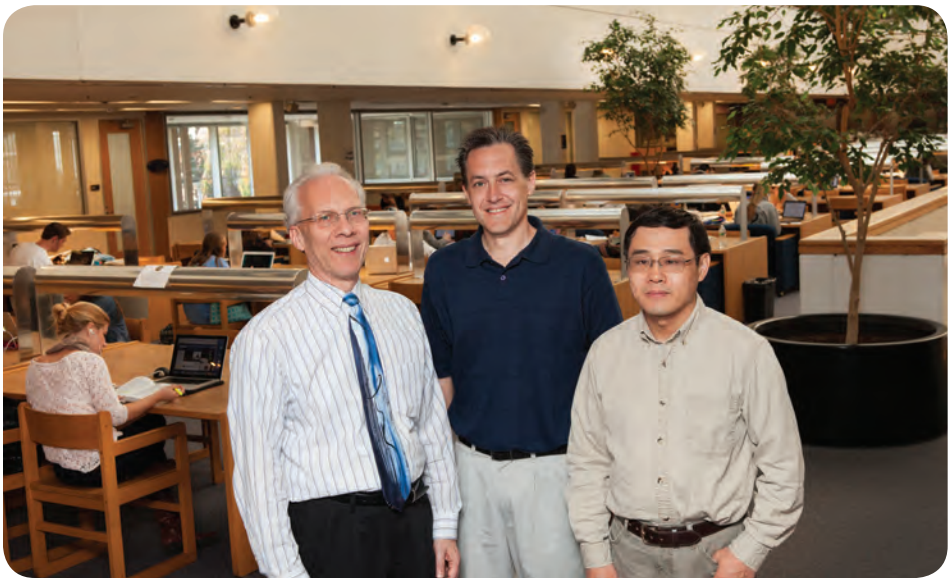
To Mr. Silvis, these WorldShare applications represent a reinvestment in the library cooperative and will shape the future of library services.

"Two goals of the OCLC cooperative are to reduce cost to libraries by sharing services and to increase access to the world's information," Mr. Silvis says. "Certainly, what we will now pay for maintenance goes back into the OCLC cooperative, but our staff resources will also go back into the cooperative. OCLC is doing things that affect libraries across the world and making libraries better places for our users."

"It's very gratifying to be involved in an organization that's at the forefront of the technological change that's shaping libraries."

—Gregg A. Silvis
Associate University Librarian for Information Technology and Digital Initiatives, University of Delaware Library

The University of Delaware Library, which includes the Hugh M. Morris Library and four branch libraries, supports more than 22,000 students and faculty, and offers access to 2.8 million print volumes as well as 42,000 serials and 310 databases.



The OCLC WorldShare Management Services team at University of Delaware Library are, from left: Gregg A. Silvis, Associate University Librarian for Information Technology and Digital Initiatives; Justin C. Wing, Head, Library IT User Support Department; and Harry Guo, Computing Support Specialist II.

Not pictured: M. Dina Giambi, Associate University Librarian for Technical Services and Resource Management; Nancy Nelson, Head, Access Services Department; Janet Siar, Head, Acquisitions Department; and Deborah Rae, Head, Metadata Services Department.

Create systemwide efficiencies in library management

OCLC WorldShare Management Services in Australia

Eight libraries in Australia are promoting library innovation and expanding the possibilities for collaboration for the OCLC cooperative with a pilot project to implement OCLC WorldShare Management Services. The participating libraries are:

- Academic Centre Library, St Mary's College and Newman College, University of Melbourne (Victoria)
- Auburn Public Library (New South Wales)
- The Hutchins School (Tasmania)
- Lowther Hall Anglican Grammar School (Victoria)
- Saint Ignatius' College, Riverview (New South Wales)
- St Michael's Collegiate School (Tasmania)
- Shire of Collie Public Library (Western Australia)
- Trinity Theological College, Leederville (Western Australia)

Laurence McDonnell, Manager, Library Services, Auburn Public Library, sees WorldShare Management Services as a way to develop collections of print, electronic and digital materials in one place—from start to finish.

"One of our main problems has been the lack of online use of our e-resources," he says. "We have close ties to our local schools and train them in using our online services, but we look forward to training them in just one access portal as opposed to 30. We also hope to increase our loans of e-books and believe that by implementing this new service we will improve access to this material."

To the Academic Centre Library, which serves 430 students and staff at St. Mary's College and Newman College, WorldShare Management Services are about enlarging their small library and keeping pace with the changing nature of users and collections.

"The WMS pilot is a great chance to learn and be part of something new," says Angela Gehrig, Director, St. Mary's College and Newman College, Academic Centre Library. "Student feedback so far about WorldCat is positive. They like being able to search multiple libraries at once, including resources at the University of Melbourne. They like the site layout and its integration with the wider Web, including social media. In addition, we hope that WMS applications and data will lessen the load on local servers, and more importantly, simplify cataloging and circulation workflows."

Auburn Public Library in Auburn, New South Wales, is one of eight libraries in Australia piloting OCLC WorldShare Management Services.

"I think this system is fantastic, especially the idea of storing and saving lists and being able to access other people's saved lists. It also allows you to create your own account, which is useful if you need to look up what you have already researched. I would highly recommend this system to anyone as it gave me a wide variety of sources on my topics."

—Sophia McQuillan
Third-year student at Newman College

OCLC WorldShare Metadata collection management at the Henry Ford Hospital

In August 2012, OCLC introduced OCLC WorldShare Metadata collection management functionality that enables output of customized MARC records from the dynamically changing WorldCat knowledge base.

WorldShare Metadata collection management automatically delivers WorldCat MARC records for collections of electronic materials, and continually updates the metadata and access URLs for these materials. This improves user access, gives staff time for other priorities and enhances collection investments.

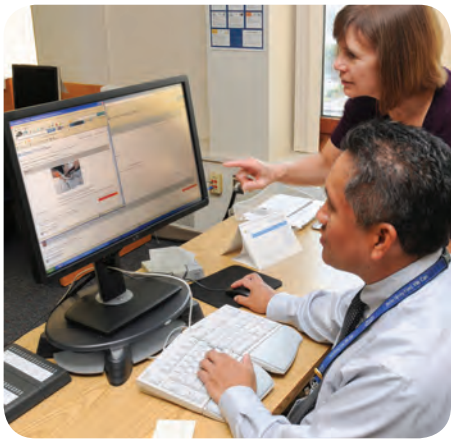
The Sladen Library at the Henry Ford Hospital, which subscribes to 3,051 e-journals and 2,759 e-books, was one of six beta-testers of the new service. After six months of using the service, Librarian Audrey Bondar and Applications Specialist Joe Escribano knew they had a solution for keeping their library's online catalog up-to-date with the latest access information to their e-content.

"Access to electronic resources for libraries has exploded over the last 10 years," says Ms. Bondar. "And maintaining accurate access information has become more problematic, especially for e-books.

"E-books are moving targets," she says. "One day the MARC record correctly reflects the book that it is linked to and the next day it does not. We needed a method to track changes as they occurred and a way to update our records to reflect the correct information. We look forward to implementing this new process to provide accurate current information for our patrons."

"Having the opportunity to work with OCLC to create a process for a better workflow has been invaluable."

—Audrey Bondar
Librarian, Sladen Library,
Henry Ford Hospital



Librarian Audrey Bondar and Applications Specialist Joe Escribano.

The Sladen Library at Henry Ford Hospital in Detroit, Michigan, USA, is part of an integrated library system within the Henry Ford Health System serving the information needs of the physicians, employees, students, patients and community.

Staff members are responsible for the centralized support of the Health System's e-resources, catalog and website.

Create systemwide efficiencies in library management

OCLC WorldShare Interlibrary Loan at Jefferson County Public Library

In January 2012, OCLC began beta testing the new OCLC WorldShare Interlibrary Loan service, which will replace WorldCat Resource Sharing in 2013. WorldShare Interlibrary Loan transforms traditional interlibrary loan into a broader fulfillment service that centralizes workflows now managed in multiple systems, and provides new functionality that saves time for both library staff and library users.

Interlibrary loan is a critical part of the Jefferson County (Colorado) Public Library's mission to enrich the quality of life for all people by providing resources for information, education and recreation.

"We have a philosophy in regards to our patrons and their needs—we say yes!" says Franca C. Rosen, Head, Interlibrary Loan Services. "This simple phrase extends to requesting items for our patrons that are not in our collection."

Jefferson County Public Library was among 20 member libraries in the beta test and viewed participation as an opportunity to shape the future of interlibrary loan.

"Over the years, we have worked to streamline our ILL process to handle the growing number of requests we receive," says Ms. Rosen. "We look to the tools we have at hand, all with the goal to process more efficiently and track more expediently.

"New WorldShare ILL functionality, such as connecting lending requests to circulation status, will be amazing time savers," she says. "The new service will be a powerful tool in the processing of requests, both lending and borrowing."

"WorldShare ILL will help our ILL department process requests—both lending and borrowing—more efficiently."

—Franca C. Rosen
Head, Interlibrary Loan Services
Jefferson County Public Library

Jefferson County Public Library, Lakewood, Colorado, is the third-largest public library in the state. By processing more than 56,000 ILL requests each year, the Interlibrary Loan Department supports the library's goal to meet the changing needs of its communities by providing information and environments that promote personal growth and community transformation. The staff are, from left to right: Barbara Horan, Library Page, Interlibrary Loan; Melinda Streeter, Interlibrary Loan Associate, Lead Worker; Kathy McOmber, Interlibrary Loan Associate; Charlotte Schell, Interlibrary Loan Associate; Mary Komodore, Interlibrary Loan Associate; Franca Rosen, Head of Interlibrary Loan Services; Theresa Kosmicki, Interlibrary Loan Associate; and Janet Lee, Library Page, Interlibrary Loan.

Represent the full range of member collections and services where the library user is

WorldCat Local at Saxion University

The first library in the Netherlands to implement WorldCat Local is at Saxion University of Applied Sciences, with locations in Enschede, Deventer and Apeldoorn.

Saxion opted for OCLC's Webscale discovery and delivery solution because of the combination of integrated search and social media functionality along with the large amount of content the system delivers.

"Our being the first Dutch library to implement made Saxion a bit of pioneer, so we had some fine-tuning to do to make WorldCat Local work in the Dutch library environment," says Eddy Tulp, Director of the Saxion Library. "But it's been worth it. We are getting positive feedback."

"We are working on a redesign of our website, and WorldCat Local will have a central position in it," says Ronald Wijlens, who, as Team Leader Media, was closely involved in the implementation. "We think a discovery tool is inevitable in a library environment. Our users had to get used to it, but they now see the added value. We created a two-minute instruction video, which also shows the benefits of integrated searching through all databases."

Saxion plans on making more use of WorldCat data by building services with the APIs. Jan Mark Koopmans, ICT Specialist at Saxion Library responsible for the technical implementation, says: "We already work with APIs to integrate WorldCat Local into our Blackboard environment. And we want to improve the user experience by personalizing this, offering tailored content depending on who is signing in."

The library at Saxion University of Applied Sciences serves more than 22,000 students and 1,200 faculty, and supports research and study at six research centers and 13 academic schools.

"WorldCat Local is a good offering. We see a great future for a discovery tool like this, and we like the price tag."

—Eddy Tulp
Director of the Saxion Library

Represent the full range of member collections and services where the library user is

South African Libraries and WorldCat Local

Since 1997, OCLC has partnered with Sabinet, a South African company established to facilitate access to information and to support and promote OCLC services in sub-Saharan Africa. The South African National Union Catalog was loaded into WorldCat in 2006, and libraries are making use of Connexion for cataloging on an ongoing basis.

In July 2011, Sabinet began offering WorldCat Local as a discovery tool to academic and research institutions in South Africa. Implementation, configuration and training are handled locally by Sabinet. Good progress has been made with the implementation and configuration of WorldCat Local at 24 institutions, including the National Library of South Africa.

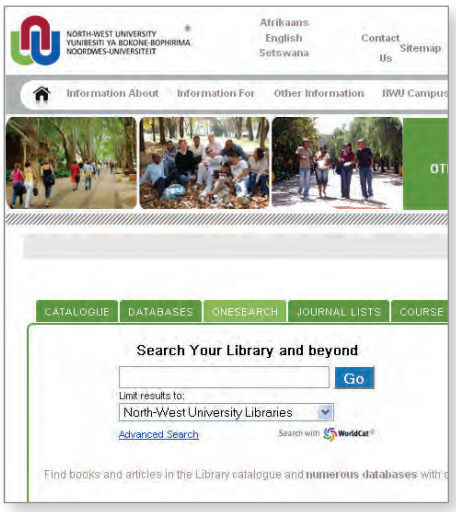
The North-West University is a merged university consisting of three separate campuses—Mafikeng, Potchefstroom and Vanderbijlpark—serving 64,000 students in a huge rural area in the North-West Province in South Africa. Above is the Potchefstroom campus.

"WorldCat Local is a logical extension to the OCLC and Sabinet services already embraced by South African libraries. The extensive functionality and the ease of implementation of WorldCat Local offer significant benefits. This is a bold and imaginative move that really represents a quantum leap for South African libraries and the information community as a whole."

—Rosalind Hattingh
Managing Director, Sabinet

"Because of the distance between the three campuses, the need to co-exist and co-service our users virtually has become a necessity. At the end of 2011, the North-West University Library adopted WorldCat Local as our discovery platform on all our campuses. It was phased in during 2012 during a relatively simple and painless process. We are amazed by the value for students from this powerful, integrated and comprehensive discovery tool."

—Elsa Esterhuizen
Director, Library Services, Ferdinand Postma Library,
Potchefstroom Campus



WorldCat Local mobile at McGill University

OCLC is bringing WorldCat into the mobile mainstream.

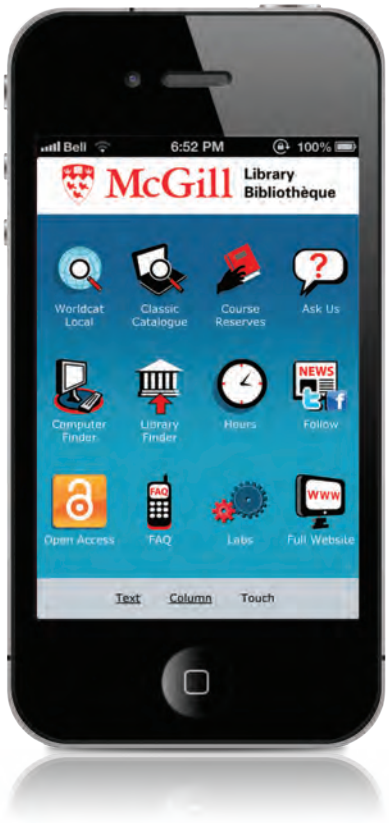
Following two years of research and usability testing, a production version of WorldCat Local optimized for mobile access was introduced in June 2011. The mobile-optimized WorldCat Local makes it possible for mobile users to discover items; see location, shelf status, call numbers and levels of availability; place a hold; request the item; or e-mail citations for content in their local library and in libraries worldwide. Any smartphone or feature phone capable of running JavaScript or a Java-based Web browser, such as Opera Mini or Bolt, is supported.

WorldCat Local mobile allowed the Library at McGill University to provide users with the ability to search its resources through an intuitive search interface designed for mobile devices. Users can perform quick, known-item searches, looking up books mentioned in class or interesting titles they come across while doing their course readings. They can find out where the item is located and if it is available for loan. If there is an electronic version of the resource available, they can access it directly. They can also e-mail the item details to themselves to follow up on later.

WorldCat Local mobile delivers several key benefits to the McGill Library, one of which is the ability to leverage its WorldCat Local discovery layer without having to configure or maintain a separate set of resources.

"When we look around at our students in the library and on campus, they are all on their mobile phones—texting, calling, searching—so we want the library to be where they are. I'm glad that we can say that you can access millions of resources, including e-books, from our library directly on your mobile device."

—Joseph Hafner
Senior Director, Collection Services
McGill University Library



"OCLC's decision to implement WorldCat Local mobile as a Web app instead of a native application is a perfect fit with our mobile strategy, and made it easy for us to integrate it into our existing array of Web services."

—Edward Bilodeau
Web Services Librarian
McGill University Library

The Library at McGill University, Montréal, Québec, Canada, deployed a mobile website in 2010 in response to the rapid growth and adoption of the smartphone. Recognizing that convenience is key to the delivery of content, the ability to look up items from anywhere is a vital part of the library's strategy to meet the changing needs of today's students, faculty and staff.

Represent the full range of member collections and services where the library user is

WorldCat.org

The launch of the WorldCat.org service in 2005 represented a significant advance in both the discoverability of library resources and the promotion of library value in the Web world.

Through WorldCat.org, the OCLC cooperative is integrating the collections and services of libraries into the consumer Web space to reach people who now use their Web browsers for information. OCLC is partnering with popular Web platforms and Internet companies to put library records and holdings in the results lists of search engines, social networking sites and online booksellers in order to drive traffic to local library services. Each month, there are nearly 20 million page views of WorldCat.org that originate from search engine sites and other partners. Traffic from WorldCat.org to library services—online public access catalogs, (OPACs), interlibrary loan services, full-text articles, virtual reference services—averages some 900,000 clicks per month, with approximately 80 percent of clicks going to library OPACs.

In fiscal 2012, referrals to the WorldCat.org landing page jumped 44 percent from the previous year and passed the 1 billion mark in total referrals since the program began. More importantly, from WorldCat.org, there have been over 58 million clicks to local library services—bibliographic records, shelf status information and online reference services.

WorldCat.org mobile

Since a pilot program launched in 2008, there have been 6.9 million views of WorldCat.org using more than 2,400 mobile devices. The Apple iPad (42%), iPhone (24%) and iPod Touch (5%) account for around three-fourths of all views.

Top 10 referrers to WorldCat.org

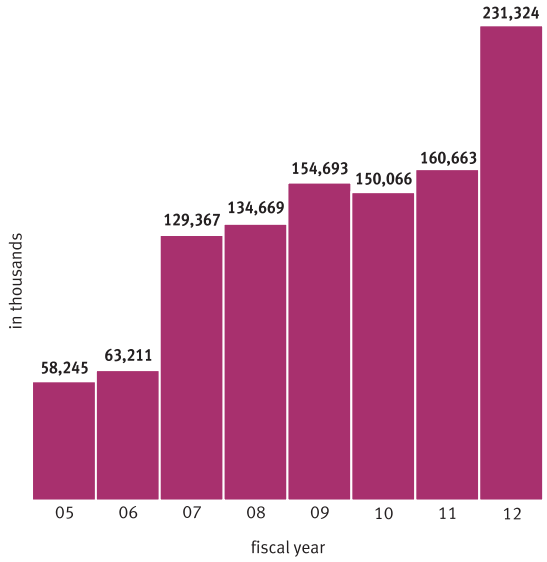
October 1, 2007–June 30, 2012

Referrer	Clicks
Google	128,850,485
Yahoo!	15,034,169
Open Library	6,808,480
Universität Karlsruhe	6,662,855
EasyBib	5,675,178
Wikipedia	4,171,949
Baidu	3,090,122
Bibme	2,600,477
Bing	1,535,865
Scientific Commons	1,262,200

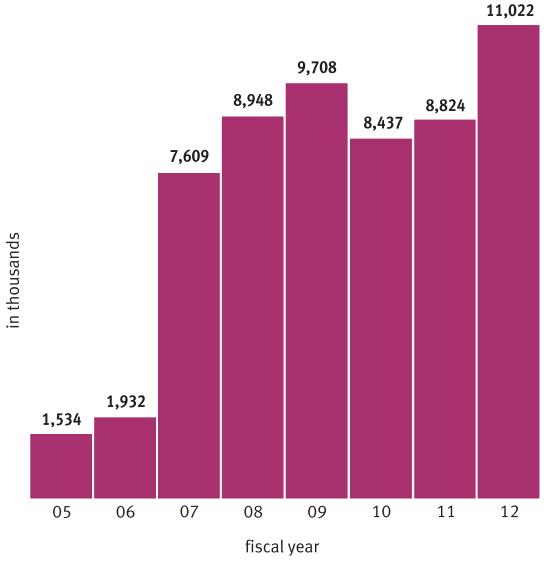
Average monthly traffic from WorldCat.org in fiscal 2012

- 4.4 million unique users
- 918,521 clicks to library services
- 19.3 million page views
- 9.8 million full-record views

Referrals to WorldCat.org



Clicks to library services



Build a global infrastructure that is responsive to local conditions

Protecting data privacy, ensuring data security

Libraries maintain personal information on their users, including names, addresses and records of items checked out. OCLC takes a holistic approach to protecting the privacy of individual library users and to safeguarding the cooperative's data.

In February 2012, OCLC achieved certification for the International Organization for Standardization (ISO) 27001:2005 Information Security Management System (ISMS) from Lloyd's Register Quality Assurance (LRQA).

The teams below monitor OCLC's adherence to security and privacy policies applicable to libraries around the world.

OCLC Information Security & Data Assurance Team
Shaun Baines, Security Liaison, (Sheffield); Ron Candage, Business Continuity Manager (Dublin); Jan Jaap Diemel, Security Liaison (Leiden)

Jason Pubal, Information Security Engineer (Dublin); Christian Rehberger, Security Liaison (Oberhaching); Jos Visser, Security Liaison (Leiden).

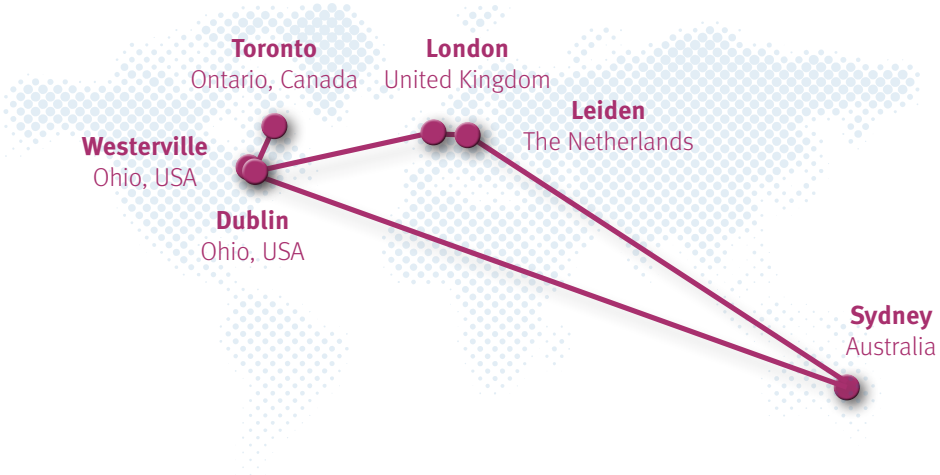
OCLC Privacy Team
Matt Cull, Senior Attorney and Privacy Officer (Dublin); Dorien Hooman, Legal Director and Secretary, OCLC EMEA (Leiden); Boris Nentwich, Assistant Controller and Privacy Officer (Oberhaching); Stacey Wideman, Senior Attorney (Dublin).

"ISO 27001 facilitates OCLC's cloud computing strategy and ensures that its systems comply with applicable laws for security and privacy. This approach responds to members' needs to protect the privacy of their users.

—Bill Lisse
OCLC Information Security Officer

OCLC global infrastructure

In fiscal 2012, OCLC extended its global data centers by offering OCLC WorldShare Management Services from data centers that serve Australia, Canada, Europe, the Middle East and Africa.



Build a global infrastructure that is responsive to local conditions

ISNI: Building an infrastructure for the interoperability of libraries, rights management, research, professional and trade organizations

In November 2011, the ISNI system and database began operation as a hosted service, running on CBS software in the OCLC Leiden office.

ISNI (International Standard Name Identifier) is an ISO-certified global standard for identifying the millions of contributors to creative works and those active in their distribution, including writers, artists, creators, performers, researchers, producers, publishers and aggregators. It is part of a family of international standard identifiers that includes identifiers of works, recordings, products and rights holders in all repertoires, such as DOI, ISAN, ISBN, ISRC, ISSN, ISTC and ISWC.

Data from the Virtual International Authority File (VIAF) serves as a base file of the ISNI database along with data from 15 rights management societies and education, trade and professional organizations. OCLC is a founding member of the ISNI International Agency, a London-based, not-for-profit organization that is responsible for ISNI's administration and governance. Other members are: The International Confederation of Authors and Composers Societies (CISAC), International Federation of Reproduction Rights Organisations (IFRRO), International Performers Database Association (IPDA), the Conference of European National Librarians (48 European national libraries represented by the Bibliothèque nationale de France and the British Library) and ProQuest (Books In Print).

As of September 30, 2012, 1.5 million ISNIs have been assigned. Of these, 220,000 are for research scholars with more than 2 million links for these identities among the source contributors to the database. The system includes a notification system to ensure that ISNIs are distributed widely and freely to data contributors, and from there to databases on the Web. ISNI quality teams at the British Library and the Bibliothèque nationale de France work closely with the Assignment Agency at OCLC to ensure accuracy, currency and accessibility. The new ISNI service offers the opportunity for OCLC and its member libraries to employ common identifiers that enable new direct linking with the databases of rights management, education, trade and professional organizations on a global and cross-domain scale.

"Libraries are strongly involved in linked data projects where identities constitute navigation nodes in the cultural heritage knowledge graph. Their long-term investment in authority files takes a new life in this context. Libraries believe that ISNI, as a bridge identifier, will give a new push to the seamless interconnection of their resources on the Web, and will enhance the role of those resources in a broadening networking environment."

—Anila Angjeli
Bibliothèque nationale de France and a member of the ISNI Quality Team

"It has been an exciting ride seeing ISNI evolve from a concept to a development project to a hosted database, system and service. Many people have helped realize this in the finance, legal and other departments, but the persistence and skill of the development and operation teams in OCLC Leiden played a substantial role in realizing the new system. They worked in close cooperation with the VIAF team in OCLC Research and the ISNI Quality Team at the Bibliothèque nationale de France and British Library. We now have a truly interoperable, cross-domain service."

—Janifer Gatenby
OCLC EMEA Program Manager, Metadata

"Working with OCLC and the BnF on the quality assurance of the ISNI database has shown how traditional cataloging skills and concepts in authority control can have a transformational impact when allied with the programming and problem-solving skills of the OCLC systems team. If cataloging is by analogy sometimes seen as working at the coalface, working on ISNI feels like mining its richest new seam."

—Andrew MacEwan
Head of Collection Processing, Collection Acquisition & Description, the British Library and Secretary of the ISNI-IA

ISNI team at OCLC EMEA in Leiden, the Netherlands.

Seated: Wil Koot, Stefan van den Anker, Agnes Vercammen, Janifer Gatenby, Ben Landsbergen, Huug Peters.

Standing: Clemens Buijs, Paul Smit, Stefan Huizer, Hetty van Zutphen, Hans van Eck, Ryan Sutherland, Martin Zwaal, Eric Helsper.

Not pictured: Els van Doorn, Rob Koopman, Swasti Purkayastha, Wouter Sieburgh, Elena Versluijs, Sjef Werry.

"ISNI has the potential of playing an important part in IFRRO's and its membership's constant quest to facilitate easy legal access to copyright works. It provides a tool that can improve the efficiency and reliability of the automated rights clearance process and facilitate distribution of revenues back to authors and publishers for the use of their works."

—Olav Stokkmo
Chair of the ISNI-International Agency, and Chief Executive, IFRRO (The International Federation of Reproduction Rights Organisations)

Advance the future of libraries through research, advocacy and community making

Enhancing large-scale metadata aggregations: clustering Europeana

Europeana is Europe's digital library, archive and museum. It currently gives people access to over 20 million books, paintings, films, recordings, photographs and archival records from 2,200 partner organizations, through an interface in 29 languages.

Aggregating metadata from heterogeneous collections leads to quality issues such as duplication, uneven granularity of the object descriptions and ambiguity between original and derivative versions of the same object.

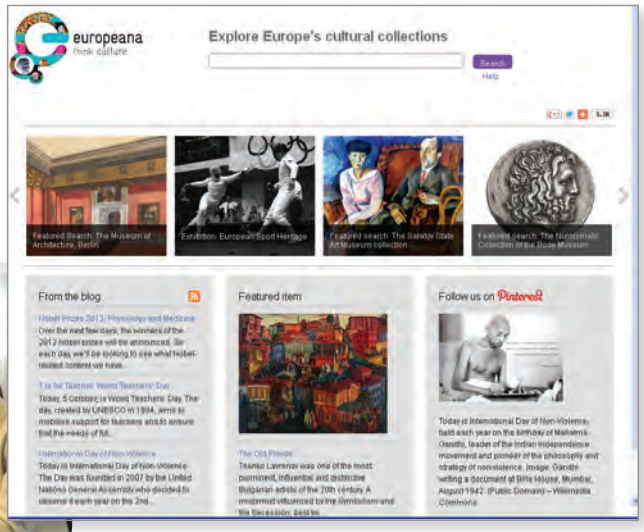
OCLC and Europeana are collaborating to investigate ways of improving the end-user experience of the Europeana.eu portal through "similar object browsing." Specific goals of the innovation pilots are to deduplicate the Europeana records, link them to VIAF and create semantic links between objects that are connected. Examples include translated copies of the same publication, a painting and a photograph of that painting, different editions of one book, or a collection of letters that belong to the same archive.

During the first stages of the pilots, OCLC Research developed an advanced clustering methodology that works fast and efficiently on a large-scale dataset such as Europeana. This method can be applied to any large dataset. The ongoing work on the characterization of similar clusters aims to assist the retrieval process and raises new interfacing and visualization challenges.

"Our objective is to create interesting synergies with innovation initiatives in Europe. We want to bundle our expertise and skills in areas where we can help make a difference. Large-scale metadata aggregations are a case in point."

—Titia van der Werf
Senior Program Officer,
OCLC Research

The collaboration between Europeana and OCLC Research benefits both organizations and their partners, offering new methods and techniques for data enrichment. The outcomes of the research project will feed into the implementation of the Europeana Data Model (EDM), which is devised to improve the browsing experience of the Europeana.eu. visitors. In addition, the piloting of OCLC's data clustering and enrichment techniques will inform the development of new data services.



Europeana/OCLC research project team members, from left to right: Titia van der Werf, Senior Program Officer, OCLC Research; Rob Koopman, OCLC Innovation Lab Architect; Valentine Charles, Ingestion Specialist, Europeana; Antoine Isaac, Scientific Coordinator, Europeana; and Shenghui Wang, OCLC Research Scientist.

Not pictured: Anthi Agoropoulou, Pilot Evaluator, Europeana; and Nuno Freire, Interoperability Architect, The European Library. Team members are based in the Netherlands.

Supporting librarians as they learn and lead

Membership reports

In 2003, OCLC began to build a body of international market research on the information consumer and to share that research both inside and outside the library community. In compiling these reports, OCLC has worked with library and information experts throughout the world as well as organizations such as Gartner, Outsell, Pew and Amazon.

Among the latest reports are a series of regional scans published in 2012 that examine librarians' top priorities, key current initiatives, thoughts on future service points and the sources they use to keep up with developments in the library field. More than 4,000 academic, community college and public library staff—including directors, managers and librarians in Germany, the Netherlands, the United Kingdom and the United States—participated in the study. To find out more, visit: www.oclc.org/reports.

Geek the Library

Currently active in hundreds of libraries in 40 states, the Geek the Library community awareness campaign is designed to spread the word about the vital and growing role of public libraries and raise awareness about the critical funding issues many U.S. public libraries face. In 2012, the program received an additional $1.9 million, three-year grant from the Bill & Melinda Gates Foundation to extend participation to more libraries and improve support.

Geek the Library is operated by OCLC and is based on the results of OCLC's research published in *From Awareness to Funding: A study of library support in America*. OCLC piloted the campaign in 2009–2010 and made it available for use by all U.S. public libraries in 2010. The research, pilot campaign and ongoing operations have been funded by the Bill & Melinda Gates Foundation. To find out more, visit: Get.geekthelibrary.org.

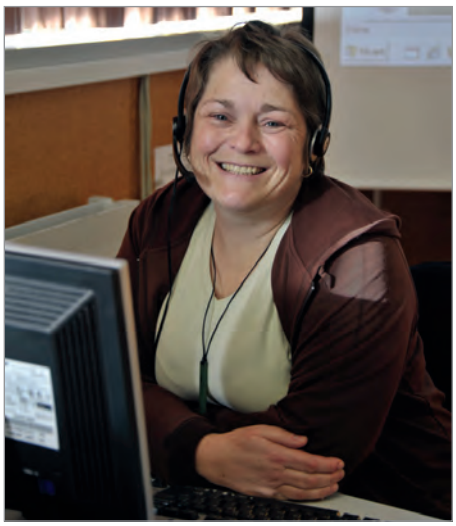
Many participating libraries localize their Geek the Library campaigns by including community members on posters and in advertising.

WebJunction

WebJunction.org is the learning place for libraries. Built with grant funding from the Bill & Melinda Gates Foundation and launched in 2003, the site provides a range of resources—including online courses, webinar presentations, downloadable curricula and best practices from libraries—to share the knowledge, skills and support that librarians and library staff need to manage their libraries.

WebJunction's programs and content have been used by staff in 69 percent of U.S. public libraries. From July 2011 through June 2012, library staff enrolled in more than 19,000 courses, and more than 17,000 staff members registered for 26 free webinar programs offered on trends in the library profession.

In September 2012, OCLC received a $4.1 million grant from the Bill & Melinda Gates Foundation to support five additional years of ongoing operations of WebJunction. To find out more, visit: www.webjunction.org.



As travel costs increase and library budgets decrease, WebJunction's online learning offers great advantages for staff training.

Advance the future of libraries through research, advocacy and community making

Connecting Wikipedia and libraries

OCLC has joined the British Museum, the National Archives and Records Administration, the Smithsonian Institution and other cultural heritage organizations that are working with the Wikipedians-in-Residence program to facilitate greater cooperation between institutions and the Wikipedia community. Wikipedians in Residence work from within a host institution to facilitate the improvement of Wikipedia content on the collections held by that institution.

OCLC's residency has a unique twist—to explore the special role that library data, such as the OCLC Virtual International Authority File (VIAF) and WorldCat, can play in the world's largest and most active online encyclopedia. The effort involves Max Klein, Wikipedian in Residence at OCLC; Andrew Gray, Wikipedian in Residence at the British Library; and Merrilee Proffitt, Senior Program Officer, OCLC Research.

The collaboration has resulted in development of the VIAFbot, an automated process that will create reciprocal links between Wikipedia articles about people and corporations, and those in VIAF. The VIAFbot is expected to generate 260,000 new links that will help researchers and scholars disambiguate names and improve accuracy of articles and citations.

OCLC Research and the Wikipedians are exploring other ways that authoritative library data can be linked to Wikipedia and other Wikimedia projects, such as Wikisource and Wikimedia Commons.

"VIAFbot is important on two different levels; on the surface it's a large-scale bridge between two useful resources, but it's also emblematic of a style of Wikipedia collaboration I envision. I wanted to go beyond the handiwork of manual improvement and focus on big data linking and analytics. VIAFbot is a proof of concept that we can dream big, and dream algorithmically about organizations contributing to Wikipedia."

—Max Klein
Wikipedian in Residence at OCLC, and co-developer of the VIAFbot

"Wikipedians and librarians are two cultures separated by a common goal—both are committed to open access to knowledge, and to the use of authoritative sources. It's a two-way street. We in libraries have a lot to learn from this community, and we also have a lot to offer."

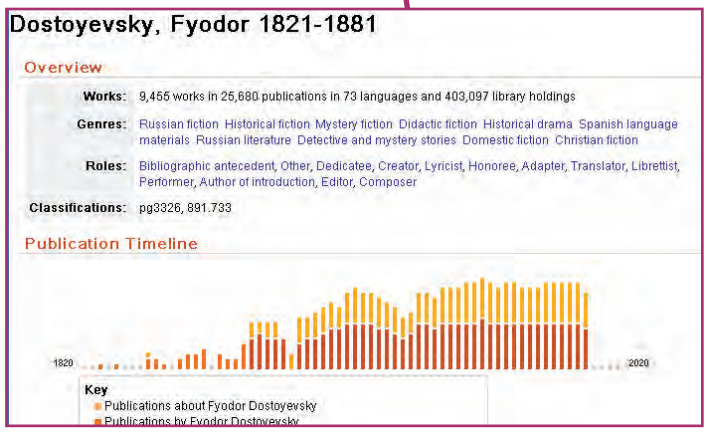
—Merrilee Proffitt
Senior Program Officer, OCLC Research

"One of the earliest goals of Wikipedia was to allow its content to be reused as widely as possible. Linkages with library collections offer a wealth of new opportunities for researchers, connecting authority information to much richer metadata than was traditionally available."

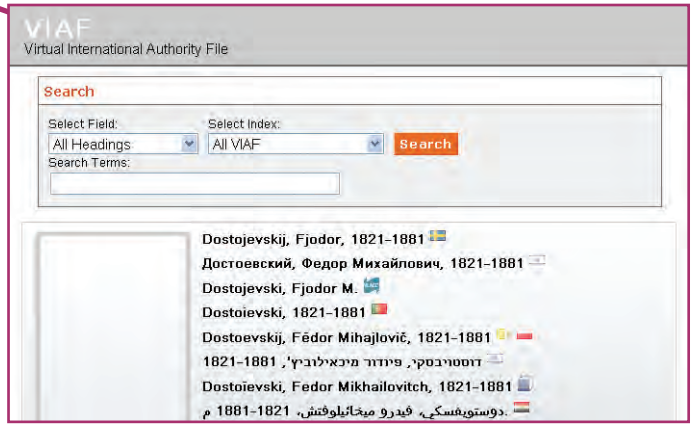
—Andrew Gray
Wikipedian in Residence at the British Library, and co-developer of the VIAFbot

According to Alexa, a provider of global Web metrics, Wikipedia is the sixth most-visited website. Its results are highly ranked by Google and other search engines. Increasingly, snippets from Wikipedia articles are making their way into Google's Knowledge Graph and other sites on the Web. So it is vital that those visiting Wikipedia are able to easily make their way back to library resources.

WorldCat and the OCLC Virtual International Authority File (VIAF) are among the links attached to the Wikipedia article.



WorldCat Identities creates a summary page for each author in WorldCat. It lists 9,455 works in 25,880 publications in 73 languages and 403,097 library holdings for Fyodor Dostoyevsky. From this page, a library user can identify specific items and locate libraries that hold them.



VIAF matches and links the authority files of national libraries and groups all authority records for a given entity into merged "super" authority records. By linking disparate names for the same person or organization, VIAF provides a convenient means for a wider community of libraries and agencies to repurpose bibliographic data produced by libraries that serve different language communities.

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OCLC Global Council—
The voice of OCLC members

The 2011/2012 OCLC Global Council

Global Council is the global voice of the OCLC cooperative. It is the connector between the different regions and their elected bodies as well as the Board of Trustees. It is the venue where all members via their elected delegates can contribute to further development of OCLC as well as discuss topics of general interest and relevance.

In 2011–2012, the activities of the delegates were based on an annual plan that included these key areas:

- Members and Governance
- Communication
- Planning Processes, Product Development and Service Implementation

Two in-person meetings in Dublin, Ohio, USA, on November 7–9, 2011, and April 16–18, 2012, were the basis of information exchange, communication, discussion and elections. Additionally, task forces and ad hoc working groups addressed various issues and projects throughout the year.

Members and Governance

One of the most important tasks of the Global Council is the election of a total of six members of the OCLC Board of Trustees.

In 2012, two positions became vacant, and the Council elected two experienced colleagues to the Board: Loretta Parham, CEO and Director, Atlanta University Center Robert W. Woodruff Library; and Jennifer Younger, Executive Director, Catholic Research Resources Alliance, and Edward H. Arnold Director of Hesburgh Libraries Emerita, University of Notre Dame.

Global Council, represented by several Executive Committee members, was also involved in the process of seeking a new OCLC president and CEO.

As the OCLC cooperative becomes more global, new layers of diversity are created. New questions are asked, and answers must be found. Therefore, it should come as no surprise that discussions of membership and how best to govern a global cooperative are recurrent themes in the affairs of Global Council. Strong cooperation between the Council and the Board of Trustees is still necessary in order to come to widely accepted solutions.

Communication

The steady growth of our cooperative in different parts of the world requires very effective communication structures that use different channels to guarantee that all voices can be heard and that the flow of information in both directions can be ensured.

Therefore, communication task forces were installed at regional and global levels, and their members worked hard to create effective mechanisms and procedures. Governance of the cooperative requires well-informed members who are willing to participate in development efforts as well as provide input on behalf of the entire library community.

Planning Processes, Product Development and Service implementation

The Global Council finds itself in the midst of a major shift in technology and capabilities. The migration of OCLC's traditional and well-known services to the new world of platforms requires a strong and deep discussion about objectives for individual libraries and the cooperative as well as future workflows. OCLC is one of the drivers of this technological change, and delegates want and need to be well-informed not only about OCLC services, but also developments in the larger community that affect the future of libraries. To that end, delegates explored topics such as linked open data, e-book growth and the introduction of RDA (Resource Description and Access) in discussions and presentations.

The Council welcomed two guest speakers during the year. At the November meeting, Stuart Hamilton, Director of Policy and Advocacy, IFLA, spoke on the transition of libraries into a post-print, post-copyright era. In April, Sue Polanka, Head of Reference and Instruction, Wright State University, and the author of *No Shelf Required: E-books in Libraries*, discussed the future of e-content.

I would to thank my colleagues on Global Council and in the Regional Councils for their hard work this past year. They spent a lot of time and effort to support the OCLC cooperative at a worldwide level. Voluntary engagement is perhaps the most important element of our cooperative. Trust and common interests are the social adhesive that holds us together. I am grateful for the opportunity to have worked with the delegates on Global Council and for the honor to have served as their President.

Berndt Dugall
2011/12 President
OCLC Global Council

OCLC Global Council delegates 2011/2012

Bonnie Allen
Middle Tennessee State University

Lluìs Anglada
Consorci de Biblioteques Universitàries de Catalunya

Simon Bains
University of Manchester

Rosann Bazirjian
University of North Carolina at Greensboro

ChewLeng Beh
National Library Board, Singapore

Raymond Bérard
ABES

Sarah Campbell
Portland Public Library

Melinda Cervantes
Pima County Public Library

Hsueh-hua Chen
National Taiwan University Library

Dalia Corkrum
Whitman College

Deborah Dancik
Willamette University

Henriette de Kok
Bibliotheek Midden-Brabant

John DeSantis
Dartmouth College

Carol Diedrichs
The Ohio State University

Berndt Dugall
Universität Frankfurt

Alison Elliott
National Library of New Zealand

Poul Erlandsen
The Royal Library–CULIS

Ian Fairclough
George Mason University

Joyce Garnett
The University of Western Ontario

Robin Green
University of Warwick

Debbie Johnson-Houston
McNeese State University

Royce Kitts
Tonganoxie Public Library

Oleg Kreymer
Metropolitan Museum of Art

Karen Lequay
The University of the West Indies

William Maes
Dalhousie University

Makoto Nakamoto
Waseda University Library

Lisa O'Hara
University of Manitoba

Gilda Oliva
Ilustre Municipalidad de Coihueco

Annsofie Oscarsson
Mälardalen University

Ann Pederson
Altru Health System

Lori Phillips
University of Wyoming

Barbara Preece
California State University San Marcos

Anne Prestamo
Oklahoma State University

Mark Pumphrey
El Paso Public Library

Donna Reed
Portland Community College

OCLC Global Council—
The voice of OCLC members

OCLC Global Council delegates 2011/2012 *continued*

Rupert Schaab
University of Göttingen

Debbie Schachter
Douglas College Library

Anja Smit
Utrecht University

Cynthia Steinhoff
Anne Arundel Community College

Jerry Stephens
University of Alabama at Birmingham

Wilbur Stolt
University of North Dakota

John Szabo
Atlanta-Fulton Public Library System

Jane Treadwell
University of Illinois at Springfield

Anne Van Camp
Smithsonian Institution Archives

Jon Walker
Pueblo City-County Library District

Andrew Wells
University of New South Wales

Patrick Wilkinson
University of Wisconsin–Oshkosh

Jennifer Younger
Catholic Research Resources Alliance, and Hesburgh Libraries, University of Notre Dame

The 2011/2012 OCLC Global Council Executive Committee

Seated, left to right: **ChewLeng Beh**, Global Council Vice President/President-Elect; **Anja Smit**, Vice Chair/Chair-Elect, EMEA Regional Council (EMEARC); **Hsueh-hua Chen**, Vice Chair/Chair Elect, Asia Pacific Regional Council (APRC); **Barbara Preece**, Vice Chair/Chair-Elect, Americas Regional Council (ARC); **Berndt Dugall**, Global Council President.

Standing left to right: **William Maes**, Chair, Americas Regional Council (ARC); **Robin Green**, Chair, EMEA Regional Council (EMEARC); **Andrew Wells**, Chair, Asia Pacific Regional Council (APRC).

www.oclc.org/councils/global/

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Bibliothèque et Archives Canada

Jonathan Furner
University of California at Los Angeles

Andrea Kappler
Evansville Vanderburgh Public Library

Caroline Kent, EPC Chair
British Library

Lyn McKinney
Billings Senior High School Library

Pat Riva
Library and Archives Quebec/
Bibliothèque et Archives nationales du Québec

Anne Robertson, EPC Vice Chair
Australian Committee on Cataloguing

Deborah Rose-Lefmann
Northwestern University

Joan Mitchell
OCLC

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Kevin Clair
Pennsylvania State University

Jennifer Clarke
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Joel Hahn
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Linda Roberts
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Jessica Tobin
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Margaretta Yarborough
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Jeff Ehlers
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Anna Sylvester
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Anne Prestamo
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Tim Rogers
NC LIVE

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Holly Tomren
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Ted Fons
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Technology Advisory Board

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Allan McLaughlin
JTA Enterprises, LLC

Chuck Trent
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Gene Oliver
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WorldShare Interlibrary Loan Advisory Group

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Wendy Walker
University of Glasgow

Lisa Williams
University of North Carolina Wilmington

Arnold Arcolio
OCLC

Mindy Pozenel
OCLC

Colleen Way
OCLC

Financial Report 2011/2012

Report of the Audit Committee

The Audit Committee, consisting entirely of independent trustees, assists the Board of Trustees in its oversight of OCLC's financial reporting process, and is responsible for, among other things, reviewing with Deloitte & Touche LLP, our independent auditors, the scope and results of its audit engagement.

The management of OCLC has the primary responsibility for the preparation and integrity of OCLC's financial statements, accounting and financial reporting principles, and internal controls and procedures designed to assure compliance with accounting standards and applicable laws and regulations. OCLC's independent auditors are responsible for performing an independent audit of the consolidated financial statements and expressing an opinion on their conformity with accounting principles generally accepted in the United States of America.

The accompanying condensed consolidated financial statements and financial information included elsewhere in the annual report are derived from the audited consolidated financial statements and include amounts that represent the best estimates and judgments of management.

In fulfilling its oversight responsibilities, the Audit Committee has:

- Reviewed and discussed with management the audited consolidated financial statements of OCLC for fiscal 2012.
- Discussed with Deloitte & Touche LLP the matters required by AICPA AU 380, *The Auditor's Communication With Those Charged With Governance*.
- Received from and discussed with Deloitte & Touche LLP the communications required by AICPA Independence Rule 101.

Based on the Audit Committee's independent discussions with management and the independent auditors, and the Audit Committee's review of the representations of management, and the report of the independent auditors to the Audit Committee, the Audit Committee recommended to the Board of Trustees that the audited consolidated financial statements for the year ended June 30, 2012 be accepted. The audited consolidated financial statements, accepted by the Board of Trustees, appear at OCLC's website: www.oclc.org/news/publications/financial.

Audit Committee

Maggie Farrell, Chair
Anthony Ferguson
Bernadette Gray-Little
Cindy Hilsheimer
Larry Alford
Sandra Yee

Management Representatives

Jay Jordan
President and
Chief Executive Officer, OCLC

Rick J. Schwieterman
Executive Vice President and
Chief Financial Officer, OCLC

Financial Review and Management Commentary

Financial Review

Despite periods of intermittent recovery, the global economic climate remained uncertain during fiscal 2012. Unemployment rates remained high worldwide and library budgets in both Europe and North America continued to be stressed.

In fiscal 2012, OCLC revenues were $203.5 million, down 1.0 percent from fiscal 2011 revenues of $205.6 million. The decrease was due to a number of factors, including the sale of the rights to license certain third-party databases that OCLC made available via FirstSearch, the transition of e-journals to an archive-only access service and the discontinuation of the Language Sets service. OCLC divested or discontinued these services because they no longer aligned with its strategic direction. In addition, there was a reduction in OCLC's traditional core service revenues (Online Cataloging, Resource Sharing and FirstSearch) that was only partially offset by growth in newer services (OCLC WorldShare Management Services and WorldCat Local) and the first full year of revenue from the acquisition of BOND, a leading integrated system provider for public libraries in German-speaking countries.

Operating results (Contribution to equity before portfolio gains/(losses) and gain on sale of product lines) in fiscal 2012 were $610,000, compared to a $1.7 million loss the previous year. Net Contribution (appears in the financial statement on page 45 as "Excess of Revenues over Expenses") in fiscal 2012 was $6.8 million, compared to $11.1 million in fiscal 2011. See chart "Consolidated Activities."

In fiscal 2012, revenues from libraries and institutions outside the U.S. increased $4.7 million to $54.9 million, reflecting the full-year revenue impact of the BOND acquisition in April 2011. Currency translation decreased revenues by $1.1 million in fiscal 2012, as compared to fiscal 2011 revenues. See chart, "Revenue by Region."

OCLC continuously invests in new hardware, software, databases and development of systems to provide services to participating institutions. This investment fluctuates, depending on service growth, new product introductions and replacement cycles for facilities, equipment and software. In fiscal 2012, enterprise resource investment was $53.6 million (including capitalized development costs), an increase of $7.9 million from the previous year. Over the last five years, enterprise resource investment has totaled over $260 million, reflecting OCLC's commitment to upgrade existing computer systems, develop and implement new library services, and maintain existing services to libraries. See chart "Enterprise Resource Investment."

Research and development expenditures in fiscal 2012 were $31.6 million. Development efforts focused on OCLC's strategy to build Webscale services with libraries. See chart "R & D Expenditures Including Capitalized Development."

During the year, OCLC provided libraries with $22.4 million in credits, incentives and subsidies for cooperative programs, primarily for cataloging and resource sharing, to encourage the growth and quality of WorldCat, clearly demonstrating OCLC's commitment to its public purposes. Since 1998, OCLC has returned over $230 million in credits and subsidies to member libraries.

As of June 30, 2012, the investment portfolio stood at $189.7 million, of which $58.6 million secured library deposits for the advanced subscription program and unearned revenue for library services. OCLC returns to libraries 4 percent interest on advanced subscription payments,

Consolidated Activities

	Fiscal Year	
(Amounts in Thousands)	**2012**	**2011**
Revenues	$203,470	$205,620
Products & Services	200,830	202,020
Grants	1,800	2,570
Research Library Partner Dues	840	1,030
Dividends and Interest Income–Sustainability Fund	5,850	4,990
Operating Results before Portfolio Gains/(Losses) and Other Gains	610	(1,690)
Net Realized Gains on Investment Portfolio–Sustainability Fund	3,650	12,780
Gain on Sale of Product Lines	2,580	0
Net Contribution to Corporate Equity	$6,840	$11,090

Financial Review and Management Commentary

which are applied to charges for OCLC services. Realized gains and losses are reflected in the annual net contribution. OCLC's sustainability fund is used for working capital, long-term growth and funding development opportunities. See chart "Investment Portfolio: Securing Member Library Funds."

As of June 30, 2012, OCLC had assets of $369.8 million and corporate equity of $236.7 million. Net working capital, which represents funds available for current operations, was $156.2 million.

In summary, OCLC is well-positioned to continue to fund innovative services on behalf of its members.

Management Commentary

OCLC is a nonprofit, membership, computer library service and research organization whose public purposes of furthering access to the world's information and reducing library costs dominate its plans and activities.

In support of these purposes, OCLC strives to maintain a strong financial base by operating in a business-like manner in order to accommodate growth, upgrade technological platforms, conduct research and development and subsidize worthwhile projects for the benefit of libraries and their users.

OCLC follows a conservative, nonaggressive accounting and operating philosophy in maintaining its financial reporting and internal control systems.

Member-owned, Member-governed

OCLC is member-owned and member-governed. These are major characteristics that distinguish the OCLC-member relationship from the traditional vendor-customer model. Librarians throughout the cooperative, in both large and small libraries, have rightfully come to think of their institutions as stakeholders in OCLC.

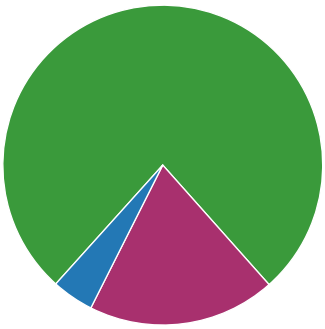
Indeed, throughout OCLC's history, on any significant matter involving prices and charges to the membership, there has been full disclosure, thorough due process, and open communications between the membership and OCLC through the Global Council and Board of Trustees.

OCLC funds its operations and research and development with revenues generated by services provided to participating libraries and does not rely on government appropriations, foundation funding (except for specific grant-related projects) or membership assessments.

It should be noted that in fiscal 2012, OCLC spent approximately $35 million on growth and maintenance of WorldCat and other databases. This includes $12 million for development (see chart "Enterprise Resource Investment") and $23 million for batchloading, quality control and compliance with standards.

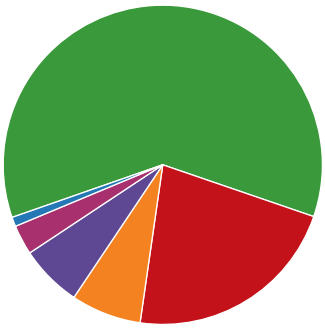
Approximately 75 percent of OCLC's expenditures are in support of developing new and maintaining existing products and services. Governance, Membership, Advocacy and Research comprise 8 percent and directly benefit OCLC's member libraries. See charts "Sources of Funding" and "Uses of Funds."

FY 2012
Revenue by Region
Total $203.5M



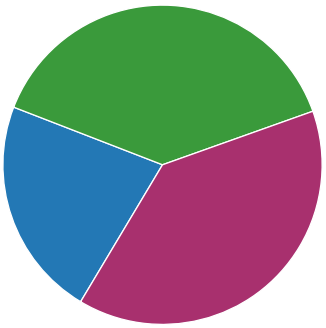
Americas 77%
Asia Pacific 4%
Europe, Middle East, Africa 19%

FY 2012
Enterprise Resource Investment
Total $53.6M



Internal Development 61%
Software 1%
External Development 3%
Facilities 6%
Hardware 7%
Databases 22%

FY 2012
R & D Expenditures Including Capitalized Development
Total $31.6M



Core Products & Services 39%
New Products & Services 22%
Other 39%

Fiscal 2012

Subscription Versus Transaction Pricing

(In millions)	Transaction	Subscription	Savings
Cataloging	$81.6	$53.1	$28.5
Interlibrary Loan	$22.2	$20.2	$2.0

Total savings for libraries: $30.5M

Operating at Breakeven

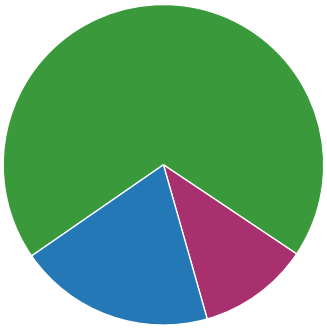
Historically, OCLC has operated at near breakeven, realizing revenues that approximate the costs to deliver services and programs to libraries and institutions. With the concurrence of the Board of Trustees and Global Council, OCLC strives to achieve an annual contribution (excluding portfolio gains/(losses)) on a five-year rolling average of 2 to 4 percent in order to maintain long-term financial viability in pursuing its public purposes. In fiscal 2012, OCLC generated a positive contribution before portfolio gains/(losses) and sale of product lines. The five-year rolling average contribution before portfolio gains/(losses) and sale of product lines through 2012 was breakeven. For the most recent five years, OCLC's financial strength enabled it to support a temporary deviation from the 2 to 4 percent goal in order to advance its strategic investment in products and services as well as to hold the line on prices for libraries in a difficult economy. See chart, "Contribution before Portfolio Gains/(Losses) and Sale of Businesses."

Pricing

OCLC's financial strength and independence give it the wherewithal to assist member libraries in both good and bad times. For example, during the recent economic downturn, OCLC froze prices in cataloging and resource sharing in North America for the last three fiscal years and has held any increases in other regions to a minimum. (In fiscal 2013, OCLC increased its prices by a modest 2.75 percent in North America, the first such increase in four years.) Consistent with its public purposes, OCLC has kept its cumulative price increases substantially below the level of inflation that educational institutions have experienced and also below increases in the consumer price index. See chart, "Percent Change in HEPI, CPI and OCLC Cost Sharing," on page 7.

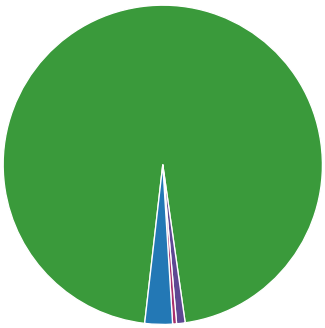
In the long term, OCLC's goal is not to maximize returns nor to price services to what the market will bear, but rather to provide pricing that represents the lowest possible shared costs of the cooperative. OCLC fully understands the challenges that reduced budgets pose for both libraries and OCLC. OCLC continues to work diligently to control costs and to minimize any price increases. OCLC also strives to provide maximum flexibility in its service offerings. OCLC is sensitive to regional differences, differential pricing based on economic development and the use of more traditional measures such as collection sizes and population served. This multifaceted approach is consistent

at June 30, 2012
Investment Portfolio: Securing Member Library Funds
Total $189.7M



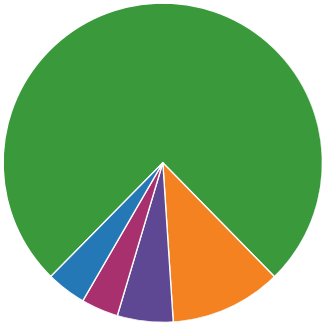
Sustainability Fund 69%
Unearned Revenue 20%
Advance Subscription Payments 11%

FY 2012
Sources of Funding
Total $209.3M



Product and Service Revenues 96%
Sustainability Fund 3%
Research Library Partner Dues <1%
Grants 1%

FY 2012
Uses of Funds
Total $208.4M



Products & Services 75%
Governance/Membership/Advocacy 4%
OCLC Research 4%
Corporate IT 6%
Corporate Support 11%

Financial Review and Management Commentary

with the needs of a global membership organization.

For example, in 2006, after consultation with Global Council and the Board of Trustees, OCLC replaced its transaction pricing model with a subscription model. OCLC staff had noticed that many members did not take full advantage of the labor-saving services offered by OCLC because those services might increase their OCLC costs under the transaction-based pricing system. As a result of the change, use of services rose dramatically. Thus, in fiscal 2012, subscription pricing saved libraries some $30.5 million in reduced charges in fiscal 2012 and enabled them to do more for less. See chart "Subscription Versus Transaction Pricing."

Economic benefits of OCLC membership

Since OCLC began providing online services in 1971, the network effects and economies of scale have steadily accumulated as the number of participants has increased. Today, libraries that are copy-cataloging on OCLC enjoy an average hit rate of 95 percent, which means for each 100 items they catalog, they will have to create an original catalog record for only five items. This is a significant savings in labor costs. The following are examples of two other OCLC services that generated dramatic costs savings for the libraries that used them in fiscal 2012.

OCLC ILL Fee Management is part of the Resource Sharing subscription. It enables a library that conducts interlibrary loans to reconcile its resource sharing charges and payments through its monthly OCLC invoice. It eliminates check writing and invoice processing for individual interlibrary library loan transactions. In fiscal 2012, libraries used IFM to reconcile 898,781 interlibrary loans transactions, thereby saving an estimated $54 million, based on an estimated processing cost of $60 per transaction.

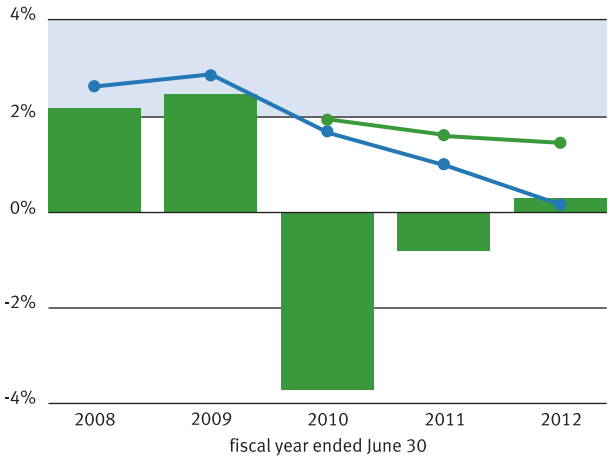
WorldCat Cataloging Partners (WCP) is essentially an automated cataloging service for libraries. It is a collaborative effort with materials vendors to reduce the cost of cataloging for libraries. It delivers OCLC MARC records that match the materials a library orders through participating vendor partners and sets the library's holdings automatically in WorldCat. In fiscal 2012, WCP processed 4.9 million records for 4,235 libraries. These were machine-to-machine activities that did not require the intervention of cataloging staffs in libraries.

The new WorldShare Management Services discussed elsewhere in this annual report also hold the promise of reducing per-unit costs for libraries and improving library workflows consistent with OCLC's public purposes.

Going forward, OCLC management will continue to be diligent stewards of the cooperative's assets and conduct its financial activities in a conservative manner and with the highest standards of ethical conduct.

Rick J. Schwieterman
Executive Vice President and Chief Financial Officer

Contribution before Portfolio Gains/(Losses) and Sale of Businesses



- Contribution before portfolio gains/(losses) and product line sales as a percent of revenue (within each year)
- Target range of average 5-year contribution, 2–4% before portfolio gains/(losses)
- 5-year average contribution before portfolio gains/(losses) and product line sales (target of 2–4%)
- 5-year average had there been a 2% cost-share price increase in FY10, FY11 and FY12

OCLC Charter

The purpose or purposes for which this corporation is formed are to establish, maintain and operate a computerized library network and to promote the evolution of library use, of libraries themselves, and of librarianship, and to provide processes and products for the benefit of library users and libraries, including such objectives as increasing availability of library resources to individual library patrons and reducing rate of rise of library per-unit costs, all for the fundamental public purpose of furthering ease of access to and use of the ever-expanding body of worldwide scientific, literary and educational knowledge and information.

Condensed Consolidated Balance Sheets

June 30, 2012 and 2011

	2012	2011
Assets		
CURRENT ASSETS	**$ 247,862,500**	$ 259,833,700
FIXED ASSETS—At cost, less accumulated depreciation and amortization	**114,027,600**	118,043,200
OTHER ASSETS	**7,923,000**	7,810,900
TOTAL	**$ 369,813,100**	$ 385,687,800
Liabilities and Corporate Equity		
CURRENT LIABILITIES	**$ 91,644,300**	$ 93,273,900
LONG-TERM DEBT AND CAPITAL LEASES—Less current portion	**29,638,800**	38,006,500
OTHER NONCURRENT LIABILITIES	**11,846,300**	14,745,100
CORPORATE EQUITY	**236,683,700**	239,662,300
TOTAL	**$ 369,813,100**	$ 385,687,800

Condensed Consolidated Statements of Revenues, Expenses and Corporate Equity

for the years ended June 30, 2012 and 2011

	2012	2011
REVENUES	**$ 203,469,300**	$ 205,618,900
OPERATING EXPENSES:		
Salaries, wages and related fringe benefits	**115,552,500**	115,727,100
Selling, general and administrative	**35,738,200**	35,480,100
Library services	**24,567,500**	27,318,300
Depreciation and amortization	**23,304,100**	22,594,500
Building and utilities	**7,141,000**	8,393,000
Total operating expenses	**206,303,300**	209,513,000
DEFICIT OF REVENUES OVER OPERATING EXPENSES	**(2,834,000)**	(3,894,100)
OTHER INCOME—Including investment income	**9,669,700**	14,986,000
EXCESS OF REVENUES OVER EXPENSES	**6,835,700**	11,091,900
NET CHANGE IN UNREALIZED (LOSS) GAIN ON INVESTMENTS	**(11,508,600)**	13,991,700
POSTRETIREMENT BENEFIT PLAN ADJUSTMENT	**2,899,900**	3,757,800
FOREIGN CURRENCY TRANSLATION ADJUSTMENT	**(1,205,600)**	1,233,200
INCREASE (DECREASE) IN CORPORATE EQUITY	**(2,978,600)**	30,074,600
CORPORATE EQUITY—Beginning of year	**239,662,300**	209,587,700
CORPORATE EQUITY—End of year	**$ 236,683,700**	$ 239,662,300

These condensed consolidated financial statements are derived from the audited consolidated financial statements that appear at OCLC's website: www.oclc.org/news/publications/financial/.

OCLC Offices, Distributors and Partners

OCLC Headquarters

Staff at OCLC Headquarters in Dublin, Ohio, USA, work with colleagues in other OCLC offices around the world. For a current list of these locations, see **www.oclc.org/contacts/offices/**.

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F +44-121-456-46-80
E uk@oclc.org

OCLC Distributors and Partners

Regional distributors in many countries contract with OCLC to provide support for OCLC services. OCLC also works with many service and consortia partners in the US to connect library groups and consortia with the OCLC cooperative through innovative programs. Learn more: **www.oclc.org/us/en/contacts/regional/** and **www.oclc.org/us/en/partnerships/service/**.

Distributors

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DLC Contexto Ltda
dlc@contextolimitada.com

Nova Informatica Limitada
http://nova-informatica.com/nova/index.html

Asia and the Pacific Region

Japan
Kinokuniya Company Ltd.
OCLC Center, Library Support & Services Division
www.kinokuniya.co.jp/03f/oclc/oclctop.htm

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Hanworld Group, Inc.
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