OCLC's March into the 21st Century

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"Extending the OCLC Cooperative: A Three-Year Strategy," dated October 23, 2000, outlined OCLC's plans for libraries and OCLC's desire to transform WorldCat from a bibliographic database and online union catalog to a globally networked information resource of text, graphics, sound, and motion. OCLC claims "this enhanced version of WorldCat will include a shared knowledge base supported by a set of integrated, web-based tools and services that facilitate contribution, discovery, exchange, delivery and preservation of knowledge objects and shared expertise of participating institutions."

Over the next 3 years, OCLC plans to "extend the present OCLC library cooperative of 40,102 institutions in 76 countries into a truly global, digital community." This will involve developing new Web-based services, implementing a new technological platform, and, most important, reaffirming a commitment to library cooperation. OCLC is a nonprofit membership organization with the stated mission "to further access to the world's information and reduce library costs by offering services for libraries and their users." The company envisions OCLC as the "leading global library cooperative, helping libraries serve people by providing economical access to knowledge through innovation and collaboration."

Founded in 1967 by university presidents in Ohio to share library resources and reduce costs by using computers and technology, OCLC introduced an online shared cataloging system for libraries in 1971 that today is used by libraries around the world. The Interlibrary Loan service, introduced in 1979, has since been used for more than 110 million loans among 6,700 libraries worldwide. The FirstSearch service was introduced as a reference tool in 1991 and is now used by 18,747 libraries. Membership in OCLC means joining a unique cooperative venture that gives a library access to WorldCat, the global union catalog, and offers fee-access to a wide range of services and databases. OCLC's membership comprises the world's largest library consortium. Members govern OCLC through a governance structure consisting of General Members, the Members Council, and the Board of Trustees.

Over the past 30 years, libraries have used OCLC shared cataloging to create WorldCat, which today is the world's foremost bibliographic union catalog. OCLC wants to extend this cooperative framework to include new participants, new types of metadata, and new automated tools to capture, organize, and deliver metadata. In addition to libraries, OCLC will seek the input of metadata from museums, archives, professional societies, publishers, and others, including authors. Each of these providers will use and share metadata that includes descriptions, holdings, reviews, and previews, as well as links to content. Metadata is frequently described as structured data about data or information about an information resource, e.g., the Dublin Core's metadata about the intellectual content, property, and/or characteristics of an information resource. Libraries can use metadata to support analysis (e.g., how patrons use the data), system design, and future development.

Governance

On its Web site, OCLC describes its governance:

OCLC Members Council was formerly known as the OCLC Users Council. Under new bylaws adopted May 21, 2001, the Users Council changed its name to Members Council and added six new delegates from outside the United States to better define its role in strategic planning and extend global representation. Members Council welcomed new delegates from the Netherlands, Japan, South Africa, France, Mexico, and China who will serve for the next 3 years while a group of representatives from council, the OCLC Board of Trustees, regional networks, and service centers continue work on a new policy to help define new standards for membership and council representation.

In an interview with Jay Jordan, president of OCLC, I asked specifically what OCLC intended when mentioning new participants, since at present
OCLC has dealt almost exclusively with the library community. This is Mr. Jordan's response:

... inclusiveness and the need to look broader without disturbing our foundation. Some may think they are exclusive of each other, but we need to look at other organizations besides libraries and other forms of data and information that they might contribute to the OCLC WorldCat database. The OCLC Board of Trustees has formed an Ad Hoc Committee on Membership to look at what other forms of contribution may be consistent with OCLC's mission. The concept of inclusiveness has also been accepted by the OCLC Members Council. Other forms of contribution may be extended to other collections, such as photographs or art, or other types of metadata. Global scope means dealing with more than just MARC21 and AACR2 records. It also means Dublin Core, UNICODE, IFLA functional requirements, and other metadata standards.

OCLC is engaged in discussions with museums and archives to try to work out arrangements with them to enable access to each other's records to better assist researchers in locating all types of information on topics and not be limited to just books and journal names.

Mr. Jordan has borrowed the concept of "Imagineering" from the Disney Corporation, and asked OCLC staff to envision what they might like the network to become if all things were possible. He readily admits that not all of the vision may become reality, but that the company is trying to talk with museums and even to other organizations in the library space such as RLG, netLibrary, and Questia, focusing on the most useful projects to enrich the OCLC database and figuring out how best to connect users to the information. His overall purpose is to enrich the discovery experience on OCLC and make it a key access point for researchers seeking to facilitate the acquisition of all the materials they might need or want to help them. (Note that this interview was conducted in early October 2001, just before netLibrary announced its latest financial difficulties and before OCLC offered to buy it. Such an acquisition will certainly go a long way in helping OCLC and Mr. Jordan in providing users with more content.)

Mr. Jordan talked further about enriching and creating links to better resolve user queries. The first step in creating this potentially enhanced network is upgrading the current 10-year-old Tandem platform on which the database currently resides to an Oracle 8i and then to Oracle 9i to better accommodate international data. A UNICODE-enabled platform allows OCLC to handle other non-Roman character sets such as Chinese, Japanese, and Cyrillic. OCLC is building the tools sets necessary for local consumption or global sharing.

OCLC recently considered changing from its current nonprofit status into a for-profit corporation when the Internet boom was at its peak and trying to become more like a "dot.com." The company ultimately rejected the change for many reasons, including the likelihood that members willing to contribute records to a nonprofit organization might have more difficulty doing so for a profit organization. It also meant they would be subject to taxation and become a more likely target of a hostile takeover.

Global Networking

"Extending the Library Cooperative," is, however, more than an OCLC strategic plan. It is also envisioned as part of an ongoing dialogue with libraries, U.S. regional networks, international distributors, and potential partners. OCLC hopes members will read the strategy, discuss it with colleagues, and join in the dialogue. Through global cooperation, OCLC hopes to convert these ideas into value-added services. The company is having discussions with potential partners about the possibilities of providing access to content that might not otherwise be easily accessible, e.g., dissertations.

Pica [http://www.pica.nl/ne/] was a library cooperative in the Netherlands and is now a Dutch corporation. In January 2000, OCLC entered into an agreement with Pica to create and run an organization that will attempt to create an integrated European information database. The new operation with OCLC is a sub-foundation incorporated under Dutch law and has been dubbed PICA BV. OCLC has been building European content, and, if OCLC can provide the appropriate links between its Dutch server, the two will be able to provide patrons with access to each other's database. This greatly expands the opportunity for patrons to find out about the existence of materials and potentially makes it much easier to obtain them, pending agreements these information suppliers.

Enhanced Web Services

The newest version of the WorldCat database now includes the obvious notation and symbol prominently displayed next to each record indicating material type. This allows users to clearly and more easily identify and get to serials, books, visual materials, sound recordings, musical scores, computer files, archival materials, and maps.

Through new or enhanced services from OCLC, libraries will become a significant presence on the Web and be viewed as a preferred and authoritative source of information. Libraries will customize their users' interface to WorldCat with links to reviews, full text, images, and other files in addition to bibliographic information. These services will help build the library brand on the Web. End-users will move easily between the library and the Web. OCLC will also help to establish an expert library cooperative, pooling expertise and resources to provide around-the-
clock, around-the-world Web reference support.

New or enhanced OCLC services will help libraries integrate selection, circulation, interlibrary loan, and full-text delivery through electronic subscription options. End-users will have access to the collections of many libraries, as well as easy order and delivery options via the Web. OCLC hopes these new services will extend library cooperation and provide greater value for more institutions.

OCLC offers cataloging tools that enable libraries to share cataloging information from the Library of Congress and other libraries. OCLC offers an integrated suite of online, batch, and contract services and software to help build and manage an electronic library, based on needs, budgets, and goals. OCLC can help reduce the costs of acquiring and cataloging materials and enhance productivity through automation, outsourcing, and delivery of shelf-ready materials.

Reference databases and online searching services are offered through the FirstSearch family of databases. The service delivers many different databases to libraries tied to the library's holdings, so students and faculty can know instantly whether the item they have found is held by their library. According to Jay Jordan, OCLC is not thinking of going directly to end-users; rather, the company truly means to enhance member library visibility and image on the Internet, making it more obvious to patrons that valuable materials are available through the systems that OCLC and libraries provide.

OCLC WorldCat is the OCLC Online Union Catalog. For nearly 3 decades, libraries have shared catalogs electronically to create the world's largest database of bibliographic information. WorldCat offers over 46 million bibliographic records — representing 400 languages — with close to 810 million holdings location listings from over 6,700 libraries, resource centers, and document suppliers. It provides a key service for collection development, cataloging, authority control, and retrospective conversion services.

The OCLC Interlibrary Loan (ILL) service helps OCLC libraries create, send, and track ILL requests with access to WorldCat. Additionally, a unique link between OCLC ILL and the OCLC FirstSearch service lets library users initiate requests online.

Alibris, a leading global supplier of hard-to-find books, and OCLC Online Computer Library Center are collaborating to offer access to a broader selection of books for libraries and their users. Alibris and OCLC will provide comprehensive links between the Alibris Library Services Web site [http://www.alibris.com/library], and OCLC's WorldCat database. Libraries that subscribe to WorldCat through the OCLC FirstSearch service will have the option to link to Alibris to find millions of out-of-print, out-of-stock, and rare books for sale. In addition, Alibris customers who cannot find a book on the Alibris Library Services Web site may check WorldCat holdings to determine its availability at a nearby library. This is the main goal of Alibris, according to Brian Elliott, senior vice president of sales and marketing. "By teaming up with OCLC, we will provide more libraries and their users with a convenient and cost-effective way to source hard-to-find books."

Libraries can customize users' interfaces to WorldCat, with links to reviews, full text, images, and other files, in addition to bibliographic information. These services should help build the library brand on the Web. End-users will move easily between the library and the Web. OCLC will also facilitate establishing an expert library cooperative in which libraries pool expertise and resources to provide around-the-clock, around-the-world reference support for people looking for information on the Web.

New or enhanced OCLC services will help libraries integrate selection, circulation, interlibrary loan and full text through electronic subscription options to provide information to people when and where they need it in a form they want. End-users will have
access to the collections of many libraries as well as easy order and delivery options via the Web.

Digital Archiving

OCLC Preservation Resources helps increase access to collections through a range of digitization and preservation services. The Digital Preservation Commons Web site provides information and promotes discussion on issues of preservation and archiving. OCLC conducts research internally and externally at universities or other research centers. The Dublin Core Metadata Initiative proposes a global standard composed of 15 metadata elements to facilitate discovery of electronic resources. The Distinguished Seminar Series stimulates the exchange of ideas across the barriers of time, space, and disciplines.

Preservation, digitization, and archiving services from OCLC help libraries increase access to unique collections as well as pass them on to future generations. OCLC will establish a digital repository for electronic materials from library collections, government agencies, and other sources of electronic content. Based on cooperation, this repository will accommodate changes in technologies and formats and provide access to electronic content using industry standards, both now and in the future.

OCLC and RLG have jointly issued a discussion document describing their work on repositories for digital preservation. The second RLG-OCLC report designed to advance long-term retention of digital research materials is now available for review and comment. You can find "Attributes of a Trusted Digital Repository: Meeting the Needs of Research Resources" at http://www.rlg.org/longterm/attributes01.pdf.

While intended primarily for research institutions and specifically for libraries and archives, this report contains guidance and recommendations applicable to any organization interested in long-term maintenance of and continuing access to digital materials. It highlights some key strategic issues as it focuses on practical assistance to administrators and implementers of digital archiving services.

The Cooperative Online Resource Catalog (CORC) is described by OCCL as a partnership that will help libraries make their collections accessible to Web searchers outside of their own Web portal. Chip Nilges, director, OCLC New Product Planning, says, "This relationship is the first of many that OCLC will undertake in an effort to raise the visibility of libraries on the Web."

The Cooperative Online Resource Catalog service is optimized to identify, select, describe, and maintain Web-based electronic resources and to create and maintain pathfinders (electronic subject bibliographies). CORC enables students to get involved in cooperatively managing the next generation of information and gain hands-on experience with state-of-the-art tools that enhance access to electronic resources.

CORC offers support of multiple metadata schemes: MARC and Dublin Core, linked authorities, automated URL maintenance to ensure currency, access to WebDewey, featuring an automated Dewey number assignment tool (educating license agreement required), access to librarian-selected electronic resources, leading-edge technology tools, tools for creating and maintaining pathfinders, automated content checking to ensure the stability of the selected resource, the advantages of a large-scale cooperative involving libraries around the globe. Jay Jordan pointed out that over 500,000 Web resources were added to the database in just 12 months with the help of volunteer institutions, substantially enhancing the discovery experience for WorldCat users.

Final Thoughts

OCLC has few strong competitors in their space in the library marketplace and has wisely decided to partner with them. OCLC's advantage lies in its overwhelming size and penetration in the library marketplace. The company's only real competitors in the U.S. had been the Research Libraries Group (RLG) and the Washington Library Network (WLN). OCLC and WLN merged on January 1, 1999. RLG is a not-for-profit membership corporation of over 160 universities, national libraries, archives, historical societies, and other institutions. In the U.S., RLG remains OCLC's only serious competitor. Overseas OCLC has small competitors such as PICA, but OCLC is choosing to partner with its competitors in order to enhance access to the information contained in those other networks and to work with them to facilitate access to the information.

OCLC's goals and visions for enhancing the network, including access to digital resources, images, archival collections as well as to books, is not one that anyone would likely argue against. When talking to Steve Coffman, author of the now famous - or infamous - "Earth's Largest Library" article ("Building Earth's Largest Library: Driving into the Future," Searcher, vol. 7, no. 3, March 1999, http://www.infoday.com/searcher/mar/coffman.htm.) about OCLC's ambitious plans, he said, "How far they'll be able to pull it off is the question. Unless they change their approach and become less beholden to all the stakeholders, it will be difficult for them to pull off."

While OCLC certainly has some serious competitors in the contract cataloging and database marketplace, for all extents and purposes, OCLC's WorldCat database has no competitor likely to challenge it. The major difference between OCLC and other vendors is that OCLC is a not-for-profit consortium whose members around the world would greatly benefit from access to those enhanced holdings. Most importantly, researchers who need access to information would be the biggest beneficiaries if OCLC can carry out its enhanced vision of the WorldCat database to the library community.

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