

# Guidelines for Contributions to WorldCat

These Guidelines are designed to assist OCLC member institutions in interpreting the Global Council document titled, “[WorldCat Principles of Cooperation](#)” and in using the document “[WorldCat Rights and Responsibilities for the OCLC Cooperative.](#)” They were endorsed by Global Council at its June 2011 meeting.

1. **“Member libraries make a commitment to contribute to OCLC all current metadata and holdings information, which represents items in their collections.”**

Many libraries question what this means to them. Most do not hesitate to add metadata and holdings for their physical collections held in their buildings, but question whether metadata for other types of materials, including e-resources, ought to be included. Below are some examples to help in deciding when to add or not to add metadata and holdings information to WorldCat.

**Member libraries are encouraged to add the following to WorldCat:**

- **Physical collections**  
If the materials are part of your permanent collection, and appear in your catalog, the metadata and holdings should appear in WorldCat. The item does not have to be classified in order to qualify for inclusion in WorldCat; many libraries only assign accession numbers to some kinds of materials but still catalog them and consider them part of their permanent collection.
- **E-Resources**  
Metadata and holdings for e-books, e-journals and other electronic resources (such as Web sites) should be included in WorldCat. The availability of metadata and holdings can facilitate linking users with content through services such as the WorldCat knowledge base. Such inclusion does not necessarily indicate the ability to loan these materials or use them to fill interlibrary loan requests, as many license agreements do not allow such use.
- **Special collections or local historical materials**  
Often special collections or local materials are not included in WorldCat because it is felt that there is no interest in them on an international level. The inclusion, however, of these materials, which are increasingly represented by digital surrogates, can be one of the richest contributions made to WorldCat. For example, use of the WorldCat Digital Collection Gateway can facilitate the contribution and maintenance of metadata for these digital objects, as well as materials held in institutional repositories.
- **Materials that a library does not wish to lend**  
Inclusion of metadata and holdings in WorldCat does not obligate any library to lend materials. It merely acknowledges that it owns a copy of the material. Many patrons using WorldCat will be interested in learning that materials are held by a nearby library, to which they can travel in order to use the material. Scholarship is

advanced by the inclusion of rare materials in WorldCat, even if the holding library has no intention of lending it. Scholars are usually willing to travel considerable distances for the privilege of examining rare materials on site.

**Member libraries are not required to add the following to WorldCat:**

- **Reserve materials**  
Academic libraries have the common practice of temporarily cataloging items not part of their collection in order to place them on reserve for a class. Usually these are personal copies of books or videos owned by the professor requesting that they be placed on reserve. Such items, because they are temporary in nature, are not required to be included in WorldCat.
- **Proprietary materials**  
Corporate libraries may not want to show acquisition or ownership of specific materials because their presence would point to classified current interests or development of new competitive products.
- **U.S. federal government documents**  
After discussion by Users Council in 1995, U.S. federal government documents, even if cataloged and classified, were identified as a legitimate exception to the requirement of adding to WorldCat the holdings of all current, Roman alphabet cataloging. Member institutions are encouraged to include them in their contributions to WorldCat to improve discoverability and cooperative collection management of these resources.
- **Rental collections**  
Member libraries may not invest in the cataloging of rental or leased collections (e.g. McNaughton) because of the temporary status of these collections in their local catalog. Therefore, not contributing holdings to WorldCat is an acceptable exclusion.

While adding metadata and holdings for these materials is not a requirement, member institutions are encouraged to include them in WorldCat, if circumstances and resources permit, in order to reflect the institution's full holdings. Effective use of some OCLC services and products may require their inclusion.

2. **“Members make a commitment to create bibliographic records and related data consistent with established guidelines maintained by OCLC and its advisory groups for entering information in WorldCat records”**

WorldCat has become the international online catalog that helps OCLC members share resources, reduce costs, and increase their visibility and impact in the communities they serve. WorldCat records must serve a variety of purposes ranging from selection to discovery and a variety of audiences ranging from expert searchers and library staff to general users of the web. OCLC recognizes that not all member libraries follow the same cataloging standards and policies. Online cataloging users following Anglo-American

cataloging standards should follow *Bibliographic Formats and Standards*, 4<sup>th</sup> edition, as a guide to the creation and maintenance of records. Member institutions that use other cataloging standards should identify the cataloging rules, terminologies, classification schemes and language of cataloging in the records they contribute to WorldCat. These member institutions should also be familiar with the general information about WorldCat found in *Bibliographic Formats and Standards*, 4<sup>th</sup> edition, Chapters 1 through 5. Minimal-level and Abbreviated-level cataloging [link to <http://www.oclc.org/bibformats/en/onlinecataloging/default.shtm#BCGGBAFC>], and other less-than-full cataloging guidelines, are accepted standards and are options for briefer records.

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