



**NORTH CAROLINA COMMUNITY COLLEGE SYSTEM**  
*H. Martin Lancaster, President*

March 31, 2004

**TO:** LRC Directors

**FROM:** Sandra Wall Williams  
Vice President for Administration

**SUBJECT:** OCLC Cataloging—Group Services Pricing

OCLC has a new group pricing model that will allow access to the OCLC database for all NC community college libraries via CatExpress, Connexion, Passport, or SmartPort connection for the Community College Libraries in North Carolina (CCLINC).

A meeting with OCLC representatives will take place on Wednesday, April 7th in Room 470 of the System Office (Caswell Building), at four NCIH locations across the state (Asheville-Buncombe TCC, Fayetteville TCC, Forsyth TCC, and Martin CC), and via phone link (if you are unable to travel) from 9:45 a.m. - 11:45 a.m. The number for the phone link is (919)733-2429.

Attached you will find an overview of the OCLC Group Services Pricing. If you have questions, please send them to Ruth Bryan at [bryanr@ncccs.cc.nc.us](mailto:bryanr@ncccs.cc.nc.us) by **Monday, April 5<sup>th</sup>**. Ruth will sort the questions and send them to OCLC in advance of the meeting.

SWW:RB:sh

Attachment

c: Presidents  
Dr. Bill Randall  
Ms. Ruth Bryan  
Mr. Kennon Briggs  
Ms. Alice Smith

CC04-074  
Email Only

## OCLC CATALOGING—GROUP SERVICES PRICING

OCLC, Inc. has developed a “group services pricing” model for providing cataloging services to groups of libraries with elements in common, such as the libraries of the NCCCS. OCLC has made a study of the NCCCS libraries, looking at the amount of cataloging activity performed by our libraries via OCLC. This included all varieties of OCLC cataloging, whether directly via CatExpress, Passport, or Connexion software interfaces, or through holdings uploads such as those done for the CCLINC libraries.

OCLC has used this study to develop a pricing proposal, which would allow all of the system libraries to have access (authorization numbers) to OCLC cataloging services. This pricing quote expires on June 30, 2004. While many details remain to be worked out, here are some of the particulars as the proposal now stands:

- The proposal from OCLC has two pricing alternatives based on participating libraries: one includes all the system libraries except Central Piedmont, and one does not. This is because Central Piedmont is unique in two ways: 1) they hold OCLC Associate-level membership, and 2) the volume of cataloging activity they do is far greater than any other individual library in the system.
- OCLC is saying that they will offer “unlimited” cataloging for the quoted prices. [Note: The price projections are based on past activity.]  
According to OCLC, there is no upper limit. The price quote for unlimited cataloging includes all normal, ongoing cataloging activity for the participating libraries, including batch loading if that is how libraries are adding their records to WorldCat. It would NOT include retrocon projects, as that is not considered normal, ongoing activity. If anyone is interested in pricing we can provide a quote for that, but that is normally a special project and not included in the quote for unlimited cataloging.
- The proposal is contingent on OCLC being able to bill in “**one annual invoice to one institution.**” They cannot support these prices if they have the overhead of having to track and bill costs to 58 institutions separately.
- The pricing includes 3 factors in each alternative: cost of access to WorldCat, cataloging transaction costs (e.g., searches, exports, etc.), and telecommunications costs. In our case, it presumes that the libraries will have continued access to WorldCat through NCLIVE. Then the unlimited cataloging price INCLUDES both the telecom and cataloging fees. There is not an option to have the unlimited cataloging, without having unlimited telecom. The purpose of this service is to know what your annual costs are, making costs predictable and easy to budget for. This will do away with all transaction based pricing as we are familiar with now.
- This “unlimited cataloging” can be done via any cataloging mechanism currently supported by OCLC. This includes OCLC software interfaces such as CatExpress, Passport and Connexion, as well as SmartPort connections for CCLINC libraries, and direct batchloading of local system holdings files.
- The System Office has funding appropriated to pay OCLC for full membership and cataloging services from the System Office. Cost increases resulting from this "group services pricing" model allowing for "unlimited" cataloging will be supported as a system wide project using college resources.

- This “Group Services” arrangement has an additional feature beyond that of providing cataloging services. It would also allow for the creation of a virtual catalog based on the OCLC holdings of all participating libraries. For example, if all the colleges decide to participate, the group catalog would contain all the WorldCat bibs that have NCCCS’ libraries holdings attached. This NCCCS virtual catalog would be searchable by all participating libraries, and could be used for ILL using OCLC ILL procedures. It would be essentially a “customized” subset of WorldCat. It would NOT be a substitute for any local automated library system, since it would not provide circ functionality, etc.
- The group catalog will show the subset of your WorldCat records, regardless of the automation system being used by the libraries. Your users would be able to see holdings for ‘their’ library, then expand searches regionally, all NCCCS libraries, other NC libraries, then the global view. This will facilitate searching for items in your system, and greatly enhance the ability for distance learners to find what they need.

The quote provided by OCLC is for the cataloging activity only. (OCLC ILL invoices will continue to be handled through the State Library.)