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Form 990  Department of the Treasury Internal Revenue Service	Return of Organization Exempt From Income Tax Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)	OMB No 1545-0047
	2008 Open to Public Inspection	

A For the 2008 calendar year, or tax year beginning 07-01-2008 and ending 06-30-2009				
B Check if applicable ☐ Address change ☐ Name change ☐ Initial return ☐ Termination ☐ Amended return ☐ Application pending	Please use IRS label or print or type. See Specific Instructions.	C Name of organization OCLC Online Computer Library Center Inc		D Employer identification number 31-0734115
		Doing Business As		E Telephone number (614) 764-6000
		Number and street (or P O box if mail is not delivered to street address) 6565 Kilgour Place	Room/suite	G Gross receipts \$ 351,719,821
		City or town, state or country, and ZIP + 4 Dublin, OH 43017		
		F Name and address of Principal Officer RICK J SCHWIETERMAN 6565 Kilgour Place Dublin, OH 43017		
I Tax-exempt status ☒ 501(c) (3) ☐ (Insert no) ☐ 4947(a)(1) or ☐ 527		H(b) Are all affiliates included? ☐ Yes ☐ No (If "No," attach a list See instructions)		
J Web site: OCLC.ORG		H(c) Group Exemption Number		
K Type of organization ☒ Corporation ☐ trust ☐ association ☐ other			L Year of Formation 1967	M State of legal domicile OH

Part I Summary

Activities & Governance	1	Briefly describe the organization's mission or most significant activities See Additional Data Table		
	2	Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its assets		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	15
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	14
	5	Total number of employees (Part V, line 2a)	5	1,170
	6	Total number of volunteers (estimate if necessary)	6	0
	7a	Total gross unrelated business revenue from Part VIII, line 12, column (C) . . .	7a	874,324
	b	Net unrelated business taxable income from Form 990-T, line 34 . . .	7b	-70,717
Revenue			Prior Year	Current Year
	8	Contributions and grants (Part VIII, line 1h)	12,605,242	6,906,824
	9	Program service revenue (Part VIII, line 2g)	195,455,631	198,300,276
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	9,225,270	-24,129,753
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	3,869,035	3,862,337
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	221,155,178	184,939,684
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	152,335	193,922
	14	Benefits paid to or for members (Part IX, column (A), line 4)		0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	93,368,211	94,988,239
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		0
	b	(Total fundraising expenses, Part IX, column (D), line 25 ⁰ _____)		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)	111,113,786	117,291,468
	18	Total expenses—add lines 13–17 (must equal Part IX, line 25, column (A))	204,634,332	212,473,629
	19	Revenue less expenses Subtract line 18 from line 12	16,520,846	-27,533,945
	Net Assets or Fund Balances			Beginning of Year
20		Total assets (Part X, line 16)	382,907,749	335,992,644
21		Total liabilities (Part X, line 26)	171,111,151	158,882,580
22		Net assets or fund balances Subtract line 21 from line 20	211,796,598	177,110,064

Part II	Signature Block
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Please Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge			
	Signature of officer			2010-05-13 Date
	RICK J SCHWIETERMAN EXEC VP & CFO Type or print name and title			
Paid Preparer's Use Only	Preparer's signature	Date	Check if self-employed ☐	Preparer's PTIN (See Gen Inst)
	Firm's name (or yours if self-employed), address, and ZIP + 4			EIN
				Phone no

May the IRS discuss this return with the preparer shown above? (See instructions) ☐ Yes ☐ No

Part III

Statement of Program Service Accomplishments (See the instructions.)

1

Briefly describe the organization’s mission

See Additional Data Table

2

Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

Yes

No

If “Yes,” describe these new services on Schedule O

3

Did the organization cease conducting or make significant changes in how it conducts any program services?

Yes

No

If “Yes,” describe these changes on Schedule O

4

Describe the exempt purpose achievements for each of the organization’s three largest program services by expenses

Section 501(c)(3) and (4) organizations and 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a

(Code) (Expenses \$ 206,820,483 including grants of \$) (Revenue \$ 201,302,146)

OCLC is a non-profit membership, computer library service and research cooperative dedicated to the public purposes of furthering access to the world's information and reducing library costs. It was founded in 1967 by the Ohio College Association and initially provided services to 54 Ohio academic libraries. Since then, more than 72,000 libraries in 171 countries have used OCLC services to locate, acquire, catalog, lend and preserve 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 the WorldCat database. Each record in this database describes a single item or work and a list of institutions that hold the item. Since 1971, libraries have contributed over 175 million records and more than 1.5 billion location listings to the database, which spans more than 5,000 years of recorded knowledge and grows steadily—a new record is added every 10 seconds. Libraries use WorldCat for cataloging, interlibrary loan and reference. The general public can now access WorldCat from the internet and be directed to individual library catalogs from their searches. In addition, OCLC publishes the Dewey Decimal Classification, the world's most widely used library classification system, now in its 22nd edition since it was first published in 1876. In 2002, OCLC developed with the Library of Congress the QuestionPoint virtual reference desk collaborative that enables a library to provide around the clock reference coverage at very low cost. All OCLC services are designed to increase the availability of library resources and lower the rate of rise of library costs. Selected accomplishments during the year are illustrated by the following: Books and other materials cataloged 273.8 million; WorldCat searches on internet 143.1 million; Cataloging records added to WorldCat database 30.9 million; Location listings added to WorldCat database 160 million; Online interlibrary loans 10.3 million; End-user reference search transactions (FirstSearch) 72.3 million; Dewey Decimal Classification - Edition 22 1,400; Dewey Decimal Classification - Abridged Edition 14 1,200.

4b

(Code) (Expenses \$ including grants of \$) (Revenue \$)

4c

(Code) (Expenses \$ including grants of \$) (Revenue \$)

4d

Other program services (Describe in Schedule O)

(Expenses \$ including grants of \$) (Revenue \$)

4e

Total program service expenses \$ 206,820,483

Must equal Part IX, Line 25, column (B).

Form 990 (2008)

Part IV

Checklist of Required Schedules

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A 	1	Yes
2	Is the organization required to complete Schedule B, Schedule of Contributors? 	2	Yes
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	3	No
4	Section 501(c)(3) organizations Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	4	No
5	Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III	5	
6	Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I 	6	No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," complete Schedule D, Part II	7	No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III 	8	No
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV 	9	No
10	Did the organization hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V 	10	No
11	Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable 	11	Yes
12	Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? If "Yes," complete Schedule D, Parts XI, XII, and XIII 	12	No
13	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13	No
14a	Did the organization maintain an office, employees, or agents outside of the U S?	14a	Yes
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U S? If "Yes," complete Schedule F, Part I 	14b	Yes
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Part II 	15	No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Part III 	16	Yes
17	Did the organization report more than \$15,000 on Part IX, column (A), line 11e? If "Yes," complete Schedule G, Part I	17	No
18	Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18	No
19	Did the organization report more than \$15,000 on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19	No
20	Did the organization operate one or more hospitals? If "Yes," complete Schedule H	20	No
21	Did the organization report more than \$5,000 on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II 	21	Yes
22	Did the organization report more than \$5,000 on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III 	22	No
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? If "Yes," complete Schedule J	23	Yes
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer questions 24b–24d and complete Schedule K. If "No," go to question 25 	24a	Yes
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	No
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	Yes
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	No
25a	Section 501(c)(3) and 501(c)(4) organizations Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I 	25a	No
b	Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? If "Yes," complete Schedule L, Part I 	25b	No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II 	26	Yes
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? If "Yes," complete Schedule L, Part III 	27	No

Part IV

Checklist of Required Schedules (Continued)

		Yes	No
28	During the tax year, did any person who is a current or former officer, director, trustee, or key employee		
a	Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? If "Yes," complete Schedule L, Part IV		No
b	Have a family member who had a direct or indirect business relationship with the organization? If "Yes," complete Schedule L, Part IV	Yes	
c	Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? If "Yes," complete Schedule L, Part IV	Yes	
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations section 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		No
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1	Yes	
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	Yes	
36	501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		No
37	Did the organization conduct more than 5 percent of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		No

Part V

Statements Regarding Other IRS Filings and Tax Compliance

			Yes	No
1a	Enter the number reported in Box 3 of Form 1096, <i>Annual Summary and Transmittal of U.S. Information Returns</i> . Enter -0- if not applicable	1a253		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	Yes	
2a	Enter the number of employees reported on Form W-3, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return	2a1,170		
b	If at least one is reported in 2a, did the organization file all required federal employment tax returns? . . . Note: <i>If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return.</i>	2b		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	3a	Yes	
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	3b	Yes	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	Yes	
b	If "Yes," enter the name of the foreign country <u>CA , MX , CH</u> See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts .			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . .	5a		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		No
c	If "Yes," to 5a or 5b, did the organization file Form 8886-T, <i>Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction</i> ?	5c		
6a	Did the organization solicit any contributions that were not tax deductible?	6a		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		
7	<i>Organizations that may receive deductible contributions under section 170(c).</i>			
a	Did the organization provide goods or services in exchange for any quid pro quo contribution of \$75 or more?	7a		No
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c		No
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d		
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . .	7f		No
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?	7g	Yes	
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?	7h	Yes	
8	<i>Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</i> Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8		
9	<i>Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.</i>			
a	Did the organization make any taxable distributions under section 4966?	9a		
b	Did the organization make a distribution to a donor, donor advisor, or related person?	9b		
10	<i>Section 501(c)(7) organizations.</i> Enter			
a	Initiation fees and capital contributions included on Part VIII, line 12	10a		
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b		
11	<i>Section 501(c)(12) organizations.</i> Enter			
a	Gross income from members or shareholders	11a		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	11b		
12a	<i>Section 4947(a)(1) non-exempt charitable trusts.</i> Is the organization filing Form 990 in lieu of Form 1041?	12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b		

Part VI

Governance, Management, and Disclosure (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)

Section A. Governing Body and Management

For each "Yes" response to lines 2-7 below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

		Yes	No
1a	Enter the number of voting members of the governing body	15	
1b	Enter the number of voting members that are independent	14	
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3	No
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	4	No
5	Did the organization become aware during the year of a material diversion of the organization's assets?	5	No
6	Does the organization have members or stockholders?	6	Yes
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a	Yes
7b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b	Yes
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
8a	the governing body?	8a	Yes
8b	each committee with authority to act on behalf of the governing body?	8b	Yes
9a	Does the organization have local chapters, branches, or affiliates?	9a	No
9b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	9b	
10	Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990	10	Yes
11	Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	11	No

Section B. Policies

		Yes	No
12a	Does the organization have a written conflict of interest policy? If "No", go to line 13	12a	Yes
12b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes
12c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	12c	Yes
13	Does the organization have a written whistleblower policy?	13	Yes
14	Does the organization have a written document retention and destruction policy?	14	Yes
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision		
15a	The organization's CEO, Executive Director, or top management official?	15a	Yes
15b	Other officers or key employees of the organization?	15b	Yes
	Describe the process in Schedule O		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	No
16b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable Federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17	List the States with which a copy of this Form 990 is required to be filed CA , DC , IN , OH , OR
18	Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c) (3)s only) available for public inspection. Indicate how you make these available. Check all that apply. ☐ own website ☐ another's website ☒ upon request
19	Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table.
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization. RICK J SCHWIETERMAN 6565 KILGOUR PLACE DUBLIN, OH 43017 (614) 764-6000

Section A Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

☐ Check this box if the organization did not compensate any officer, director, trustee or key employee

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[illegible]

		Yes	No
3	Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	3 Yes	
4	For any individual listed online 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	4 Yes	
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>	5	No

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization

(A) Name and business address	(B) Description of services	(C) Compensation
LIFERAY INC 14548 ANSFORD STREET HACIENDA HEIGHTS, CA 91745	SOFTWARE CONSULTING	1,416,260
BEARINGPOINT INC 1676 INTERNATIONAL DRIVE MCLEAN, VA 22102	SOFTWARE CONSULTING	1,287,011
WORKSTATE CONSULTING 780 KING AVENUE COLUMBUS, OH 43212	SOFTWARE CONSULTING	1,012,756
INDEX DATA LLC 52 WHITMAN AVENUE WEST HARTFORD, CT 06107	SOFTWARE CONSULTING	670,779
QUICK SOLUTIONS 440 POLARIS PARKWAY WESTERVILLE, OH 43082	CONSULTING SERVICES	298,382

2	Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization	
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Part VIII

Statement of Revenue

				(A) Total Revenue	(B) Related or Exempt Function Revenue	(C) Unrelated Business Revenue	(D) Revenue Excluded from Tax under IRC 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns . . . 1a		6,906,824				
	b	Membership dues 1b						
	c	Fundraising events 1c						
	d	Related organizations 1d						
	e	Government grants (contributions) 1e						
	f	All other contributions, gifts, grants, and similar amounts not included above 6,906,824 1f						
	g	Noncash contributions included in lines 1a-1f \$						
	h	Total (Add lines 1a-1f) 6,906,824						
	Program Service Revenue	2a	MetaData Services					Business Code 519,100
b		Resource Share Svcs	519,100	42,652,835	42,652,835			
c		Reference Services	519,100	33,704,054	33,704,054			
d		E-Book & Audio Books	519,100	20,074,694	20,074,694			
e		Digital / Preservation	519,100	9,002,220	9,002,220			
f		All other program service revenue		9,978,898	9,978,898			
g		Total. Add lines 2a-2f \$ 198,300,276						
Other Revenue		3	Investment income (including dividends, interest other similar amounts) 6,196,837		6,196,837			6,196,837
		4	Income from investment of tax-exempt bond proceeds					
	5	Royalties						
	6a	Gross Rents	(i) Real	(ii) Personal				
	b	Less rental expenses						
	c	Rental income or (loss)						
	d	Net rental income or (loss)						
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other	-30,326,590			-30,326,590
			135,164,364					
			163,326,325	2,164,629				
			-28,161,961	-2,164,629				
	d	Net gain or (loss) -30,326,590						
	8a	Gross income from fundraising events (not including \$ of contributions reported on line 1c) See Part IV, line 18 Attach Schedule G if total exceeds \$15,000 a						
	b	Less direct expenses b						
	c	Net income or (loss) from fundraising events						
	9a	Gross income from gaming activities See part IV, line 19 Complete Schedule G if total exceeds \$15,000 a						
	b	Less direct expenses b						
	c	Net income or (loss) from gaming activities						
	10a	Gross sales of inventory, less returns and allowances . a			1,712,687	1,712,687		
3,001,870								
1,289,183								
b	Less cost of goods sold . . . b							
c	Net income or (loss) from sales of inventory . . . 1,712,687							
	Miscellaneous Revenue	Business Code						
11a	Space Rentals	531,120	1,275,326				1,275,326	
b	Misc revenue-Unrelate	900,099	874,324			874,324		
c								
d	All other revenue							
e	Total. Add lines 11a-11d \$ 2,149,650							
12	Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e 184,939,684			184,939,684	200,012,963	874,324	-22,854,427	

Part IX

Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).					
Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the U S See Part IV, line 21	128,283	128,283		
2	Grants and other assistance to individuals in the U S See Part IV, line 22				
3	Grants and other assistance to governments, organizations and individuals outside the U S See Part IV, lines 15 and 16	65,639	65,639		
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	6,127,551	3,262,178	2,865,373	
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	72,400,848	71,690,838		
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	5,491,268	5,445,964	45,304	
9	Other employee benefits	4,751,783	4,639,925	111,858	
10	Payroll taxes	6,216,789	6,084,770	132,019	
11	Fees for services (non-employees)				
a	Management				
b	Legal	600,659	41,414	559,245	
c	Accounting	611,722	49,726	561,996	
d	Lobbying				
e	Professional fundraising See Part IV, line 17				
f	Investment management fees	833,975	833,975		
g	Other	8,478,942	8,425,525	53,417	
12	Advertising and promotion	259,958	259,958		
13	Office expenses	3,125,399	3,090,185	35,214	
14	Information technology	4,027,219	3,998,659	28,560	
15	Royalties	17,520,266	17,520,266		
16	Occupancy	6,840,659	6,720,016	120,643	
17	Travel	4,388,651	4,031,302	357,349	
18	Payments of travel or entertainment expenses for any Federal, state or local public officials				
19	Conferences, conventions and meetings	551,767	545,925	5,842	
20	Interest	2,131,031	2,131,031		
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	20,406,321	20,406,321		
23	Insurance	519,834	519,834		
24	Other expenses—Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below)				
a	IFM Lending Credits	14,861,768	14,861,768		
b	Other Than Temporary In	8,998,842	8,998,842		
c	Marketing	8,104,894	8,104,894		
d	Program Incentives	6,980,975	6,980,975		
e	Cataloging Credits	2,257,743	2,257,743		
f	All other expenses	5,790,843	5,724,527	66,316	
25	Total functional expenses. Add lines 1 through 24f	212,473,629	206,820,483	5,653,146	0
26	Joint Costs. Check ☐ if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X **Balance Sheet**

		(A)		(B)		
		Beginning of year		End of year		
Assets	1 Cash—non-interest-bearing		1			
	2 Savings and temporary cash investments	24,859,942	2	22,036,955		
	3 Pledges and grants receivable, net		3			
	4 Accounts receivable, net	41,019,405	4	36,494,540		
	5 Receivables from current and former officers, directors, trustees, key employees or other related parties <i>Complete Part II of Schedule L</i>	50,000	5	50,000		
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) <i>Complete Part II of Schedule L</i>		6			
	7 Notes and loans receivable, net		7			
	8 Inventories for sale or use	3,413,935	8	4,085,922		
	9 Prepaid expenses and deferred charges	7,232,139	9	9,212,747		
	10a Land, buildings, and equipment—cost basis	<table><tr><td>10a</td><td>124,147,249</td></tr></table>	10a	124,147,249		
	10a	124,147,249				
	b Less accumulated depreciation <i>Complete Part VI of Schedule D</i>	<table><tr><td>10b</td><td>74,389,203</td></tr></table>	10b	74,389,203	48,037,690	10c 49,758,046
	10b	74,389,203				
	11 Investments—publicly traded securities	158,911,962	11	124,628,262		
	12 Investments—other securities <i>See Part IV, line 11 Complete Part VII of Schedule D</i>	8,922,294	12	9,793,665		
	13 Investments—program-related <i>See Part IV, line 11 Complete Part VIII of Schedule D</i>		13			
14 Intangible assets	59,001,261	14	60,721,376			
15 Other assets <i>See Part IV, line 11 Complete Part IX of Schedule D</i>	31,459,121	15	19,211,131			
16 Total assets. <i>Add lines 1 through 15 (must equal line 34)</i>	382,907,749	16	335,992,644			
Liabilities	17 Accounts payable and accrued expenses	22,883,051	17	20,044,138		
	18 Grants payable		18			
	19 Deferred revenue	53,424,888	19	52,953,270		
	20 Tax-exempt bond liabilities	62,952,380	20	53,290,273		
	21 Escrow account liability <i>Complete Part IV of Schedule D</i>		21			
	22 Payable to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons <i>Complete Part II of Schedule L</i>		22			
	23 Secured mortgages and notes payable to unrelated third parties		23			
	24 Unsecured notes and loans payable		24			
	25 Other liabilities <i>Complete Part X of Schedule D</i>	31,850,832	25	32,594,899		
	26 Total liabilities. <i>Add lines 17 through 25</i>	171,111,151	26	158,882,580		
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here ☐ and complete lines 27 through 29, and lines 33 and 34.					
	27 Unrestricted net assets		27			
	28 Temporarily restricted net assets		28			
	29 Permanently restricted net assets		29			
	Organizations that do not follow SFAS 117, check here ☒ and complete lines 30 through 34.					
	30 Capital stock or trust principal, or current funds	0	30	0		
	31 Paid-in or capital surplus, or land, building or equipment fund	0	31	0		
	32 Retained earnings, endowment, accumulated income, or other funds	211,796,598	32	177,110,064		
	33 Total net assets or fund balances	211,796,598	33	177,110,064		
	34 Total liabilities and net assets/fund balances	382,907,749	34	335,992,644		

Part XI **Financial Statements and Reporting**

		Yes	No
1	Accounting method used to prepare the Form 990 ☐ cash ☒ accrual ☐ other		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a	No
b	Were the organization's financial statements audited by an independent accountant?	2b	No
c	If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a	No
b	If "Yes," did the organization undergo the required audit or audits?	3b	

SCHEDULE A

(Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.
Attach to Form 990 or Form 990-EZ. See separate instructions.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization OCLC Online Computer Library Center Inc	Employer identification number 31-0734115
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Part I Reason for Public Charity Status (to be completed by all organizations) (See Instructions)

The organization is not a private foundation because it is (Please check only **one** organization)

1	☐	A church, convention of churches, or association of churches described in Section 170(b)(1)(A)(i).
2	☐	A school described in Section 170(b)(1)(A)(ii). (Attach Schedule E)
3	☐	A hospital or a cooperative hospital service organization described in Section 170(b)(1)(A)(iii). (Attach Schedule H)
4	☐	A medical research organization operated in conjunction with a hospital described in Section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state
5	☐	An organization operated for the benefit of a college or university owned or operated by a governmental unit described in Section 170(b)(1)(A)(iv). (Complete Part II)
6	☐	A federal, state, or local government or governmental unit described in Section 170(b)(1)(A)(v).
7	☐	An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in Section 170(b)(1)(A)(vi) (Complete Part II)
8	☐	A community trust described in Section 170(b)(1)(A)(vi) (Complete Part II)
9	☒	An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See Section 509(a)(2). (Complete Part III)
10	☐	An organization organized and operated exclusively to test for public safety See Section 509(a)(4). (See instructions)
11	☐	An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See Section 509(a)(3). Check the box that describes the type of supporting organization and complete lines 11e through 11h a ☐ Type I b ☐ Type II c ☐ Type III - Functionally Integrated d ☐ Type III - Other
e	☐	By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)
f	☐	If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box
g	☐	Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons? (i) a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization? (ii) a family member of a person described in (i) above? (iii) a 35% controlled entity of a person described in (i) or (ii) above?
h	☐	Provide the following information about the organizations the organization supports

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

(i) Name of Supported Organization	(ii) EIN	(iii) Type of organization (described on lines 1- 9 above or IRC section (See Instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support?
			Yes	No	Yes	No	Yes	No	
Total									

Part II

Support Schedule for Organizations Described in IRC 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Public Support						
Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add line 1-3						
5 The portion of total contribution by each person (other than a government unit or publicly supported organization) included on line 1 that exceed 2% of the amount shown on line 11, column (f)						
6 Public Support subtract line 5 from line 4						

Total Support						
Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
11 Total Support (Add lines 7 through 10)						
12 Gross receipts from related activities, etc (See instructions)					12	
13 First Five Years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here						☐

Computation of Public Support Percentage		
14 Public Support Percentage for 2008 (line 6 column (f) divided by line 11 column (f))	14	
15 Public Support Percentage for 2007 Schedule A, Part IV-A, line 26f	15	
16a 33 1/3% Test - 2008. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		☐
b 33 1/3% Test - 2007. If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		☐
17a 10% Facts and Circumstances Test - 2008. If the organization did not check a box on line 13, 16a, or 16b and line 14 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization		☐
b 10% Facts and Circumstances Test - 2007. If the organization did not check a box on line 13, 16a, 16b, or 17a and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization		☐
18 Private Foundation. If the organization did not check the box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions		☐

Part IIISupport Schedule for Organizations Described in IRC 509(a)(2)
(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support						
Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")	4,290,783	3,919,418	8,570,201	14,129,999	6,906,824	37,817,225
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	169,345,262	178,167,717	193,101,623	196,988,335	201,302,146	938,905,083
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total Add lines 1-5	173,636,045	182,087,135	201,671,824	211,118,334	208,208,970	976,722,308
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	3,489,040	2,860,789	6,363,241	12,462,867	6,372,377	31,548,314
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000	6,264,591	6,750,633	5,173,960	6,331,650	4,461,101	28,981,935
c Total of lines 7a and 7b	9,753,631	9,611,422	11,537,201	18,794,517	10,833,478	60,530,249
8 Public Support (Subtract line 7c from line 6)						916,192,059

Total Support						
Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9 Amounts from line 6	173,636,045	182,087,135	201,671,824	211,118,334	208,208,970	976,722,308
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	3,198,883	4,127,317	5,594,482	5,915,373	7,472,163	26,308,218
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after 30 June, 1975	50,102	8,729				58,831
c Add lines 10a and 10b	3,248,985	4,136,046	5,594,482	5,915,373	7,472,163	26,367,049
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
13 Total Support (Add lines 9, 10c, 11 and 12)						1,003,089,357
14 First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here						

Computation of Public Support Percentage		
15 Public Support Percentage for 2008 (line 8 column (f) divided by line 13 column (f))	15	91 340 %
16 Public Support Percentage for 2007 Schedule A, Part IV -A, line 27g	16	93 260 %

Computation of Investment Income Percentage		
17 Investment Income Percentage for 2008 (line 10c column (f) divided by line 13 column (f))	17	2 630 %
18 Investment Income Percentage from 2007 Schedule A, Part IV -A, line 27h	18	2 170 %
19a 33 1/3% Tests - 2008. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization		
b 33 1/3% Tests - 2007. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization		
20 Private Foundation If the organization did not check a box on line 14, 19a or 19b, check this box and see instructions		

Part IV

Supplemental Information. Complete this part to provide the information required by Part II, line 10; Part II, line 17a or 17b, or Part III, line 12. Provide and any other additional information. (see instructions)

Facts and Circumstances Test

SCHEDULE D
(Form 990)

Supplemental Financial Statements

Department of the Treasury
Internal Revenue Service

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

Employer identification number
31-0734115

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	
2	Aggregate Contributions to (during year)	
3	Aggregate Grants from (during year)	
4	Aggregate value at end of year	
5	Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No	
6	Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? ☐ Yes ☐ No	

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1

Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or pleasure)☐ Preservation of an historically importantly land area☐ Protection of natural habitat☐ Preservation of certified historic structure☐ Preservation of open space

2

Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Year
a	Total number of conservation easements
b	Total acreage restricted by conservation easements
c	Number of conservation easements on a certified historic structure included in (a)
d	Number of conservation easements included in (c) acquired after 8/17/06

3

Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶

4

Number of states where property subject to conservation easement is located ▶

5

Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and enforcement of the conservation easements it holds?

☐ Yes ☐ No

6

Staff or volunteer hours devoted to monitoring, inspecting and enforcing easements during the year ▶

7

Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ \$

8

Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9

In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization’s financial statements that describes the organization’s accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a

If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b

If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$

(ii) Assets included in Form 990, Part X ▶ \$

2

If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items

a

Revenues included in Form 990, Part VIII, line 1 ▶ \$

b

Assets included in Form 990, Part X ▶ \$

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3

Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐

Public exhibition

b

☐

Scholarly research

c

☐

Preservation for future generations

d

☐

Loan or exchange programs

e

☐

Other

4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV

Trust, Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☐ No

b

If "Yes," explain why in Part XIV and complete the following table

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

	Amount
1c	
1d	
1e	
1f	

2a

Did the organization include an amount on Form 990, Part X, line 21?

☐ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIV

Part V

Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a)Current Year	(b)Prior Year	(c)Two Years Back	(d)Three Years Back	(e)Four Years Back
1a	Beginning of year balance				
b	Contributions				
c	Investment earnings or losses				
d	Grants or scholarships				
e	Other expenditures for facilities and programs				
f	Administrative expenses				
g	End of year balance				

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶

b

Permanent endowment ▶

c

Term endowment ▶

3a

Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i)

unrelated organizations

3a(i)

Yes

No

(ii)

related organizations

3a(ii)

Yes

No

b

If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

3b

Yes

No

4

Describe in Part XIV the intended uses of the organization's endowment funds

Part VI

Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b)Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land		9,930,331		9,930,331
b Buildings		56,192,116	33,633,774	22,558,342
c Leasehold improvements		1,160,166	191,955	968,211
d Equipment		56,864,636	40,563,474	16,301,162
e Other				
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶				49,758,046

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Financial derivatives and other financial products		
Closely-held equity interests		
Other		
Total. (Column (b) should equal Form 990, Part X, col (B) line 12)		

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Total. (Column (b) should equal Form 990, Part X, col (B) line 13)		

(a) Description	(b) Book value
Other Assets	6,289,244
Investment in Affiliates	12,921,887
Total. (Column (b) should equal Form 990, Part X, col.(B) line 15.)	19,211,131

(a) Description of Liability	(b) Amount
Federal Income Taxes	
Deferred Retirement	1,124,727
Post Retirement Benefits	12,904,827
Members Subscription Balances	14,625,353
Other Liabilities	3,939,992
Total. (Column (b) should equal Form 990, Part X, col (B) line 25)	32,594,899

Schedule D (Form 990) 2008

Part XI

Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	
4	Net unrealized gains (losses) on investments	4	
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net) Add lines 4 - 8	9	
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	

Part XII

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12)	5	

Part XIII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Losses reported on Form 990, Part IX, line 25	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)	5	

Part XIV

Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part XIV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b

Identifier	Return Reference	Explanation
		Information required in Sch D, Part X regarding the financial statement footnote for liability for uncertain tax positions under FIN 48 (FASB Interpretation No. 48, Accounting for Uncertainty in Income Taxes). The text of the footnote in OCLC's consolidated financial statements as audited by OCLC's independent auditor Deloitte & Touche is as follows: OCLC evaluated its tax positions at June 30, 2009 and 2008, in accordance with FIN 48. Based on this evaluation, OCLC determined that there was no material impact to the Corporation's financial statements as a result of the adoption of FIN 48.

OMB No 1545-0047

Open to Public Inspection

31-0734115

Part II **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Check this box if no one recipient received more than \$5,000 ☐ ☐
Use Schedule F-1 if additional space is needed.

[illegible]

2 Enter total number of organizations that are recognized as charities by the foreign country or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter ► _____

3 Enter total number of other organizations or entities 

[illegible]

Complete this part to provide the information required in Part I, line 2, and any other additional information.

Schedule F (Form 990) 2008

Software ID:
Software Version:
EIN: 31-0734115
Name: OCLC Online Computer Library Center Inc

Form 990 Schedule F Part II - Grants and Other Assistance to Organizations or Entities Outside The United States

(a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of non-cash assistance	(h) Description of non-cash assistance	(i) Method of valuation (book, FMV, appraisal, other)
--------------------------	--	------------	----------------------	--------------------------	---------------------------------	-----------------------------------	--	---

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
OCLC Online Computer Library Center Inc

Grants and Other Assistance to Organizations,
Governments and Individuals in the U.S.

Complete if the organization answered "Yes," on Form 990, Part IV, lines 21 or 22. Attach to Form 990.

OMB No 1545-0047

2008

Open to Public
Inspection

Employer identification number
31-0734115

Part I

General Information on Grants and Assistance

- 1

Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No
- 2

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II

Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 if additional space is needed ☐

1(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
American Library Association50 East Huron Street Chicago,IL 60611	36-2166947	501(c)(3)	11,750				Operating support and funding for the Minority Scholarship Program and the Mann Citation Award
Columbus Symphony Orchestra55 East State Street Columbus,OH 43215	31-6402408	501(c)(3)	9,625				Operating Support
Drexel University3201 Arch St Suite 100 Philadelphia,PA 19104	23-1352630	501(c)(3)	14,855				Library and Information Science Research Grant
Tech Columbus1275 Kinnear Road Columbus,OH 43212	31-1658220	501(c)(3)	7,500				Operating Support
The Catholic University of America620 Michigan Avenue Washington,DC 20064	53-0196583	501(c)(3)	15,000				Library and Information Science Research Grant
United Way of Central Ohio 360 South Third Street columbus,OH 43215	31-4393712	501(c)(3)	10,000				Operating Support
University of Illinois1901 S First St Suite A Champaign,IL 61820		115	15,000				Library and Information Science Research Grant
Urban Libraries Council125 South Wacker Street chicago,IL 60606	36-3071241	501(c)(3)	6,000				Operating Support

2

Enter total number of section 501(c)(3) and government organizations

8

3

Enter total number of other organizations

0

Part III

Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Use Schedule I-1 (Form 990) if additional space is needed.

(a)Type of grant or assistance	(b)Number of recipients	(c)Amount of cash grant	(d)Amount of non-cash assistance	(e) Method of valuation (book, FMV , appraisal, other)	(f)Description of non-cash assistance

Part IV

Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.
See Additional Data Table

Identifier	Return Reference	Explanation
Procedure for Monitoring Grants in the U S	Part I, Line 2	Schedule I, Part I, Line 2 Library and Information Science Research Grant Program (LISRG) Faculty in schools of library science are eligible to apply OCLC sends out an annual call for proposals to eligible schools Applicants complete an LISRG cover page together with a research proposal, a detailed budget and supporting materials such as curricula vitae, staffing and letters of support Proposals are reviewed by selected OCLC staff and then submitted to a review panel for further evaluation and recommendation to the Vice President of the OCLC Office of Research who makes a final decision Research results are furnished to OCLC in a final project report which must be nonproprietary and in the public domain Other contributions are made for the general operating support of various public charities and government organizations Many of these are national or regional library associations but some are community organizations in locales where OCLC has offices These include arts organizations as well as the United Way and similar charitable organizations serving the community
Other Information	Part IV	In Part I of Scehdule I, a grant to a state government agency (University of Illinois) is reported OCLC was unable to obtain the EIN for the University of Illinois so that field was left blank

Schedule J
(Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

► Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

Employer identification number
31-0734115

Part I

Questions Regarding Compensation

	Yes	No
1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items ☐ First class or charter travel ☒ Travel for companions ☒ Tax idemnification and gross-up payments ☒ Discretionary spending account ☐ Housing allowance or residence for personal use ☐ Payments for business use of personal residence ☒ Health or social club dues or initiation fees ☐ Personal services (e g , maid, chauffeur, chef)		
b If line 1a is checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain	Yes	
2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	Yes	
3 Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply ☒ Compensation committee ☒ Independent compensation consultant ☒ Form 990 of other organizations ☒ Written employment contract ☒ Compensation survey or study ☒ Approval by the board or compensation committee		
4 During the year, did any person listed in Form 990, Part VII, Section A, line 1a		
a Receive a severance payment or change of control payment?		No
b Participate in, or receive payment from, a supplemental nonqualified retirement plan?	Yes	
c Participate in, or receive payment from, an equity-based compensation arrangement? If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III		No
501(c)(3) and 501(c)(4) organizations only must complete lines 5-8.		
5 For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of		
a The organization?	Yes	
b Any related organization? If "Yes," to line 5a or 5b, describe in Part III	Yes	
6 For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of		
a The organization?	Yes	
b Any related organization? If "Yes," to line 6a or 6b, describe in Part III	Yes	
7 For persons listed in form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	Yes	
8 Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs section 53.4958-4(a)(3)? If "Yes," describe in Part III		No

Part II **Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use Schedule J-1 if additional space needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations described in the instructions on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a

(A) Name	(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other compensation				
See Additional Data Table	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						
	(i)						
	(ii)						

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

Schedule J (Form 990) 2008

Software ID:
Software Version:
EIN: 31-0734115
Name: OCLC Online Computer Library Center Inc

Form 990, Schedule J, Part II - Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base Compensation	(ii) Bonus & incentive compensation	(iii) Other compensation				
Robert L Jordan	(i) (ii)	427,447		174,315	777,215	12,806	1,391,783	318,366
Rick J Schwieterman	(i) (ii)	267,713	144,906	63,008	30,356	15,810	521,793	309,308
James T Houfek	(i) (ii)	154,501	79,080	29,564	21,604	14,636	299,385	167,721
Karen Calhoun	(i) (ii)	120,619	45,238	24,545	15,535	2,664	208,601	116,701
Bruce Crocco	(i) (ii)	138,475	66,000	3,152	12,446	15,422	235,495	136,867
Lorcan Dempsey	(i) (ii)	153,138	77,368	43,812	23,662	22,123	320,103	176,659
Catherine De Rosa	(i) (ii)	183,715	89,922	16,339	24,195	16,748	330,919	188,112
Gary Houk	(i) (ii)	99,430	75,083	24,013	10,058	9,304	217,888	164,777
Jim Michalko	(i) (ii)	189,029	38,313	24,798	25,880	7,139	285,159	145,524
Robin Murray	(i) (ii)	211,277	66,992		10,563	536	289,368	111,609
George Needham	(i) (ii)	127,466	74,929	28,398	16,723	14,067	261,583	153,400
William Nilges	(i) (ii)	134,633	59,789	16,969	17,082	14,831	243,304	132,456
Tammi Spayde	(i) (ii)	140,969	53,715	11,665	17,396	16,223	239,968	127,947
Michael Teets	(i) (ii)	152,417	61,492	1,482	17,574	15,830	248,795	136,956
Andrew Wang	(i) (ii)	137,449	23,298	26,426	18,391	12,686	218,250	103,930
Greg Zick	(i) (ii)	139,354	34,709	13,670	17,394	16,727	221,854	109,109
Gene Oliver	(i) (ii)	126,572	36,431	6,860	15,648	24,633	210,144	101,560
Daniel Boivin	(i) (ii)	110,838	42,747	1,589	8,424	3,252	166,850	
Tom Hickey	(i) (ii)	125,222	32,951	37,831	18,971	14,731	229,706	113,192
Sondra Kowaluk	(i) (ii)	120,515	34,656	26,378	16,686	15,067	213,302	106,300
Andrew Pace	(i) (ii)	114,004	9,554	51,968	2,156	14,812	192,494	
Gary Perlman	(i) (ii)	174,764	13,478	1,662	9,612	3,319	202,835	104,480
Tom Shaughnessy	(i) (ii)	33,662					33,662	28,723

Schedule K (Form 990)	Supplemental Information on Tax Exempt Bonds	OMB No 1545-0047
		2008
		Open to Public Inspection

Department of the Treasury
Internal Revenue Service

To be completed by organizations that answered "Yes" to Form 990, Part IV, line 24a.
Provide descriptions, explanations, and any additional information in Schedule O.

Name of the organization OCLC Online Computer Library Center Inc		Employer identification number 31-0734115
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Part I

Bond Issues (Required for 2008)

	(a) Issuer Name	(b) Issuer EIN	(c) CUSIP #	(d) Date Issued	(e) Issue Price	(f) Description of Purpose	(g) Defeased		(h) On Behalf of Issuer	
							Yes	No	Yes	No
A	County of Franklin Ohio	31-6400067	353202DZ4	04-03-2003	26,223,310	To refund 1993 Bonds,improve real property,acquire equipment and databases		X		X
B	County of Franklin Ohio	31-6400067	NOCUSIPNO	06-14-2004	14,000,000	To finance the acquisition of office systems, equipment and databases		X		X
C	Columbus-Franklin County Finance Authority	57-1239430	NOCUSIPNO	05-23-2008	20,000,000	To finance the acquisition of office systems, equipment, and databases		X		X

Part II

Proceeds (Optional for 2008)

		A		B		C		D		E	
1	Total Proceeds of Issue										
2	Gross Proceeds in Reserve Funds										
3	Proceeds in Refunding or Defeasance Escrows										
4	Other Unspent Proceeds										
5	Issuance Costs from Proceeds										
6	Working Capital Expenditures from Proceeds										
7	Capital Expenditures from Proceeds										
8	Year of Substantial Completion										
9	Were the bonds issued as part of a current refunding issue?	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
10	Were the bonds issued as part of an advance refunding issue?										
11	Has the final allocation of proceeds been made?										
12	Does the organization maintain adequate books and records to support the final allocation of proceeds?										

Part III

Private Business Use (Optional for 2008)

		A		B		C		D		E	
		Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds?										
2	Are there any lease arrangements with respect to the financed property which may result in private business use?										

Part III Private Business Use *(Continued)*

	A		B		C		D		E	
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
3a Are there any management or service contracts with respect to the financed property which may result in private business use?										
3b Are there any research agreements with respect to the financed property which may result in private business use?										
3c Does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts or research agreements relating to the financed property?										
4 Enter the percentage of financed property used in a private business use by entities other than a 501(c)(3) organization or a state or local government										
5 Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another 501(c)(3) organization, or a state or local government										
6 Total of lines 4 and 5										
7 Has the organization adopted management practices and procedures to ensure the post-issuance compliance of its tax-exempt bond liabilities?										

Part IV Arbitrage *(Optional for 2008)*

	A		B		C		D		E	
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
1 Has a Form 8038-T been filed wth respect to the bond issue?										
2 Is the bond issue a variable rate issue?										
3a Has the organization or the government issuer identified a hedge with respect to the bond issue on its books and records?										
b Name of provider										
c Term of hedge										
4a Were gross proceeds invested in a GIC?										
b Name of provider										
c Term of GIC										
d Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied?										
5 Were any gross proceeds invested beyond an available temporary period?										
6 Did the bond issue qualify for an exception to rebate?										

Schedule L
(Form 990 or 990-EZ)

Transactions with Interested Persons

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

Employer identification number

31-0734115

Part I

Excess Benefit Transactions (section 501(c)(3) and section 501 (c)(4) organizations only).

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

1	(a) Name of disqualified person	(b) Description of transaction	(c) Corrected?	
			Yes	No

2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 ▶ \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ \$

Part II

Loans to and/or From Interested Persons

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a

(a) Name of interested person and purpose	(b) Loan to or from the organization?		(c) Original principal amount	(d) Balance due	(e) In default?		(f) Approved by board or committee?		(g) Written agreement?	
	To	From			Yes	No	Yes	No	Yes	No
Lorcan Dempsey Loan to assist with purchase of principal residence - see details below		X	50,000	50,000		No		No	Yes	
Total ▶ \$					50,000					

Part III

Grants or Assistance Benefitting Interested Persons

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of grant or type of assistance

Part IV

Business Transactions Involving Interested Persons

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
Claire Cocco	OCLC Employee who is a family member of an OCLC officer	102,477	Salary		No
Sonya Oliver	OCLC Employee who is a family member of a key employee of OCLC	83,045	Salary		No

SCHEDULE O

(Form 990)

Department of the Treasury

Internal Revenue Service

Supplemental Information to Form 990

► **Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.**

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization OCLC Online Computer Library Center Inc	Employer identification number 31-0734115
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Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 6		For the fiscal year ending June 30, 2009, membership in OCLC was open to a variety of institutions that contributed to or used the intellectual resources of the cooperative. Those institutions include libraries, museums, archives, historical societies, professional associations and other groups. Two categories of membership existed. Governing Members agree to perform all their cataloging using the OCLC WorldCat database so that the information is available for the benefit of all members of the cooperative. A second category, Members, also share a commitment to collaboration but they do not necessarily contribute all their cataloging to OCLC. Governing Members elect delegates to the OCLC Members Council. This body articulates the various interests of the Governing Members and Members to the OCLC Board of Trustees.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 7a		The OCLC Members Council (comprised of delegates elected by the Governing Members) elects six of the fifteen members of the OCLC Board of Trustees.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 7b		The OCLC Members Council ratifies changes to the Articles of Incorporation or the Code of Regulations in order for the changes to take effect.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 10		The 990 return is prepared internally by OCLC Finance Staff, in consultation with appropriate management personnel including the Chief Financial Officer, the General Counsel and the Corporate Controller. All supporting data and the return itself are reviewed by the Corporate Controller. The return is then reviewed by Deloitte Tax LLP. Finally, a copy of the 990 in electronic form is provided to the entire Board of Trustees prior to signature by the Chief Financial Officer and filing.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 12c		All employees are required to certify their knowledge of, and compliance with, the policy on an annual basis by signing a statement. If it is unclear if a conflict exists, the employee can contact the General Counsel for clarification. The employee can also file a written request for a ruling with his or her Vice President or Division Director who may reject or approve the application. If approved, the request is sent to the President for a final approval. A written response is provided to the employee indicating whether the activity can be undertaken or if it violates the conflict of interest policy and cannot be undertaken. In addition to the general policy for all employees, members of the OCLC Board of Trustees and the Strategic Leadership Team are required to answer more detailed questions in writing on an annual basis and all responses are reviewed by the Audit Committee of the OCLC Board of Trustees, the Chief Financial Officer, the General Counsel and the Corporate Controller to ensure that no conflicts exist.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 15		For all executives, the Personnel and Compensation Committee of the OCLC Board of Trustees reviews the proposed salary and an analysis of salaries in the marketplace for comparable positions prepared by an outside consultant. Once approved by the committee, the entire Board of Trustees (except for the CEO) meets in executive session to review and vote on the salary packages. The committee and the full Board consist only of individuals who do not have a conflict of interest with respect to setting the compensation for the executives. Written minutes of all Board Committees and Board of Trustee meetings are prepared.

Identifier	Return Reference	Explanation
Form 990, Part VI, Section C, line 19		The Articles of Incorporation and the annual audited financial statements are available on the OCLC website www.oclc.org/us/en/councils/documents/ www.oclc.org/new s/publications/financial/ . A description of the conflict of interest policy is contained in OCLC's Code of Conduct document which is also available on the OCLC website. In addition, the Annual Report (including condensed financial statements) is provided to the directors of all Governing Members.

Identifier	Return Reference	Explanation
990 Part XI Line 2	Financial statement audit	Pursuant to the 990 instructions, Part XI Line 2 is answered "No" because OCLC's audit and financial statements are prepared on a consolidated basis by the independent accounting firm of Deloitte & Touche. The Audit Committee of the Board of Trustees has responsibility for oversight of the audit and the selection of the independent accounting firm. The report of the Audit Commttee is available on OCLC's website at www.oclc.org/us/en/new s/publications/annualreports/ .

Identifier	Return Reference	Explanation
Schedule L, Part II	Loan to Lorcan Dempsey	OCLC loaned funds to this officer to facilitate his relocation to OCLC's headquarters in Dublin, Ohio during a prior fiscal year. These funds were used to finance a new principal residence. The loan is the result of arms-length negotiation and provides for a balloon repayment at the end of the term. Interest imputed on this loan as described in Section 7872 of the Internal Revenue Code is reported in Part VII and Schedule J of this return.

Identifier	Return Reference	Explanation
	Philosophy Statement on Board of Trustees Compensation	Since 1979, The OCLC Board of Trustees has determined that compensation for trustee service is appropriate in order to attract and retain the most qualified and able individuals, to promote economic diversity by providing an opportunity to contribute to the work of the Board by those who might otherwise be unable to do so, and to provide tangible compensation for the considerable time and effort of trustees in support of OCLC's mission. Because of the significant time commitment involved in Board service, many trustees must limit consulting and other activities for which they would be compensated. Compensation will be provided to non-employee trustees, by action of the Board, at levels consistent with those provided by other non-profit organizations that also compensate their Board members/trustees (with market defined by data from 990 filings, supplemented by non-profit published survey data). Compensation levels are also reviewed from time to time by independent compensation consultants for benchmarking against other non-profit organizations. Board compensation consists of cash payments structured as a combination of retainers and meeting fees, with higher compensation amounts for Chairs of the Board and Board Committees reflecting the additional time requirements of these positions. From time to time, there may also be additional trustee compensation for special projects/assignments as determined by the Board, depending on duration and additional time requirements.

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Attach to Form 990. To be completed by organizations that answerd "Yes" to Form 990, Part IV, lines 33, 34, 35, 36, or 37.
▶ See separate instructions.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

Employer identification number
31-0734115

Part I

Identification of Disregarded Entities

(A) Name, address, and EIN of disregarded entity	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Total income	(E) End-of-year assets	(F) Direct controlling entity

Part II

Identification of Related Tax-Exempt Organizations

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Exempt Code section	(E) Public charity status (if section 501(c)(3))	(F) Direct controlling entity

Part III Identification of Related Organizations Taxable as a Partnership

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	(E) Predominant income(related, investment, unrelated)	(F) Share of total income	(G) Share of end-of- year assets	(H) Disproporionate allocations?		(I) Code V—UBI amount on Box 20 of K-1	(J) General or managing partner?	
							Yes	No		Yes	No

Part IV Identification of Related Organizations Taxable as a Corporation or Trust

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	(E) Type of entity (C corp, S corp, or trust)	(F) Share of total income	(G) Share of end-of-year assets	(H) Percentage ownership
See Additional Data Table							

Part V

Transactions with Related Organizations

Note. Complete line 1 if any entity is listed in Parts II, III or IV

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity

b Gift, grant, or capital contribution to other organization(s)

c Gift, grant, or capital contribution from other organization(s)

d Loans or loan guarantees to or for other organization(s)

e Loans or loan guarantees by other organization(s)

f Sale of assets to other organization(s)

g Purchase of assets from other organization(s)

h Exchange of assets

i Lease of facilities, equipment, or other assets to other organization(s)

j Lease of facilities, equipment, or other assets from other organization(s)

k Performance of services or membership or fundraising solicitations for other organization(s)

l Performance of services or membership or fundraising solicitations by other organization(s)

m Sharing of facilities, equipment, mailing lists, or other assets

n Sharing of paid employees

o Reimbursement paid to other organization for expenses

p Reimbursement paid by other organization for expenses

q Other transfer of cash or property to other organization(s)

r Other transfer of cash or property from other organization(s)

Yes

No

1a

1b

1c

1d

1e

1f

1g

1h

1i

1j

1k

1l

1m

1n

1o

1p

1q

1r

No

No

No

No

No

No

No

No

No

Yes

Yes

Yes

No

Yes

Yes

No

No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(A) Name of other organization(s)		(B) Transaction type(a-r)	(C) Amount Involved
(1)	OCLC EMEA BV	K	217,839
(2)	OCLC BV	L	687,477
(3)	OCLC GMBH	L	538,250
(4)	OCLC (UK) LIMITED	L	2,186,650
(5)	ocLC (UK) LIMITED	J	124,100
(6)	oCLC (UK) LIMITED	N	175,493

Schedule R (Form 990) 2008

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

[illegible]

Software ID:
Software Version:
EIN: 31-0734115
Name: OCLC Online Computer Library Center Inc

Form 990, Schedule R, Part IV - Identification of Related Organizations Taxable as a Corporation or Trust

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal Domicile (State or Foreign Country)	(D) Direct Controlling Entity	(E) Type of entity (C corp, S corp, or trust)	(F) Share of total income (\$)	(G) Share of end-of-year assets (\$)	(H) Percentage ownership
OCLC Information Distribution Inc 6565 Kilgour Place Dublin, OH43017 87-0374788	Information Services	OH	OCLC Online Computer Library Center Inc	C		4,020,528	100 000 %
Dimema Inc 220 West Mercer St W-200 Seattle, WA98119 91-2129115	information Services	WA	OCLC INFORMATION DISTRIBUTION INC	C	96,912	1,702,303	100 000 %
OCLC PICA INC 7400 W 132ND ST 240 OVERLAND PARK, KS66213 43-1888199	INformation Services	MO	OCLC Online Computer Library Center Inc	C	99,693	1,006,004	100 000 %
OCLC EMEA BV SCHIPHOLWEG 99 2300 AW LEIDEN NL	HOLDING COMPANY	NL	OCLC Online Computer Library Center Inc	C	3,456,782	17,045,596	100 000 %
OCLC BV SCHIPHOLWEG 99 2300 AW LEIDEN NL	INformation Services	NL	OCLC EMEA BV	C	15,139,644	13,409,164	100 000 %
OCLC Gmbh GRUNWALDER WEG 28G 82041 OBERHACHING GM	INformation Services	GM	OCLC EMEA BV	C	10,404,759	2,949,154	100 000 %
OCLC AG ST JAKOB-STRASSE 96 CH-4052 BASEL SZ	Information Services	SZ	OCLC GMBH	C	606,732	269,837	100 000 %
OCLC (UK) LIMITED 861 ECCLESAL ROAD SHEFFIELD S11 7AE UK	INformation Services	UK	OCLC EMEA BV	C	11,754,265	7,527,759	100 000 %

Form 990, Schedule R, Part V - Transactions with Related Organizations

(A) Name of other organization		(B) Transaction type(a-r)	(C) Amount Involved (\$)
(1)	OCLC EMEA BV	K	217,839
(2)	OCLC BV	L	687,477
(3)	OCLC GMBH	L	538,250
(4)	OCLC (UK) LIMITED	L	2,186,650
(5)	ocLC (UK) LIMITED	J	124,100
(6)	oCLC (UK) LIMITED	N	175,493

**TY 2008 Earnings and Profits Other
Adjustments Statement**

Name: OCLC Online Computer Library Center Inc
EIN: 31-0734115

Description	Amount
Bad Debt Reserve	56,262

TY 2008 Investment in Subsidiaries Statement**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Description	Beginning Amount	Ending Amount
OCLC BV	5,778,563	5,138,126
OCLC (UK) Limited	-466,592	-300,733
OCLC GMBH	855,445	323,202
OCLC PICA Inc	95,484	0

TY 2008 Investment in Subsidiaries Statement

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Description	Beginning Amount	Ending Amount
OCLC AG	185,768	165,179

TY 2008 Itemized Other Current Liabilities Schedule**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Corporation Name	Corporation EIN	Description	Beginning Amount	Ending Amount
OCLC Online Computer Library Center Inc	31-0734115	CP - Long Term Debt	6,573,924	4,937,536
		Accrued Expenses	299,645	164,679
		Accrued Taxes	-1,211,747	23,317

TY 2008 Itemized Other Current Liabilities Schedule

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Corporation Name	Corporation EIN	Description	Beginning Amount	Ending Amount
		accrued Expenses	1,679,386	1,294,005
		accrued taxes	394,506	248,543

TY 2008 Itemized Other Current Liabilities Schedule

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Corporation Name	Corporation EIN	Description	Beginning Amount	Ending Amount
		accrued Expenses	493,782	683,576
		accrued taxes	234,797	-78,202

TY 2008 Itemized Other Current Liabilities Schedule

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Corporation Name	Corporation EIN	Description	Beginning Amount	Ending Amount
		accrued Expenses	40,997	88,434
		Accrued Taxes	10,470	11,224

TY 2008 Itemized Other Current Liabilities Schedule

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Corporation Name	Corporation EIN	Description	Beginning Amount	Ending Amount
		accrued Expenses	735,888	588,933
		Accrued Taxes	512,056	391,659

**TY 2008 Itemized Other Current Assets
Schedule****Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Corporation Name	Corporation EIN	Other Current Assets Description	Beginning Amount	Ending Amount
		Marketable Securities	4,199,197	3,556,897
		Other Receivables	96,720	74,577
		Prepaid Expenses	253,060	65,472

**TY 2008 Itemized Other Current Assets
Schedule****Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Corporation Name	Corporation EIN	Other Current Assets Description	Beginning Amount	Ending Amount
		Other Receivables	66,798	82,104
		prepaid Expenses	1,367,185	1,842,877

**TY 2008 Itemized Other Current Assets
Schedule**

Name: OCLC Online Computer Library Center Inc
EIN: 31-0734115

Corporation Name	Corporation EIN	Other Current Assets Description	Beginning Amount	Ending Amount
		prepaid Expenses	131,982	274,172

TY 2008 Itemized Other Current Assets
Schedule

Name: OCLC Online Computer Library Center Inc
EIN: 31-0734115

Corporation Name	Corporation EIN	Other Current Assets Description	Beginning Amount	Ending Amount
		prepaid Expenses	72,045	9,736

**TY 2008 Itemized Other Current Assets
Schedule****Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Corporation Name	Corporation EIN	Other Current Assets Description	Beginning Amount	Ending Amount
		prepaid Expenses	982,824	1,640,586
		other Receivables		8,916

TY 2008 Other Deductions Schedule**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Description	Foreign Amount (should only be used when attached to 5471 Schedule C Line 16)	Amount
Amortization	1,605,059	2,205,818
Consulting Fees	28,877	39,685
Employee Benefits	5,525	7,593
Insurance	75,528	103,797
Management Fees	158,041	217,194
Marketing	5,000	6,871
Miscellaneous	61,923	85,100
Occupancy Costs	21,477	29,516
Other Production Costs	1,615	2,219
Travel Expense	11,514	15,824

TY 2008 Other Deductions Schedule**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Description	Foreign Amount (should only be used when attached to 5471 Schedule C Line 16)	Amount
Amortization	529,415	727,570
Consulting Fees	795,775	1,093,626
employee Benefits	1,218,400	1,674,436
insurance	7,066	9,711
management Fees	159,738	219,526
marketing	251,284	345,337
miscellaneous	187,740	258,009
occupancy Costs	202,261	277,965
Office equipment	19,884	27,326
other Production Costs	153,659	211,172
travel Expense	309,912	425,909

TY 2008 Other Deductions Schedule**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Description	Foreign Amount (should only be used when attached to 5471 Schedule C Line 16)	Amount
Consulting Fees	17,000	15,185
insurance	2,166	1,935

TY 2008 Itemized Other Liabilities Schedule**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Corporation Name	Corporation EIN	Other Liabilities Description	Beginning Amount	Ending Amount
		Deferred Revenue	70,977	65,041
		Due to Affiliates	50,623	-962,978
		Long Term Debt	10,545,833	7,831,760

TY 2008 Itemized Other Liabilities Schedule

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Corporation Name	Corporation EIN	Other Liabilities Description	Beginning Amount	Ending Amount
		deferred Revenue	5,988,022	6,274,143
		Due to Affiliates	56,903	-958,051

TY 2008 Itemized Other Liabilities Schedule

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Corporation Name	Corporation EIN	Other Liabilities Description	Beginning Amount	Ending Amount
		deferred Revenue	214,775	429,551
		due to Affiliates	123,867	348,603

TY 2008 Itemized Other Liabilities Schedule

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Corporation Name	Corporation EIN	Other Liabilities Description	Beginning Amount	Ending Amount
		Deferred Revenue	49,191	24,060

TY 2008 Itemized Other Liabilities Schedule

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Corporation Name	Corporation EIN	Other Liabilities Description	Beginning Amount	Ending Amount
		deferred Revenue	4,388,192	5,343,863
		due to Affiliates	65,056	1,311,330

TY 2008 Other Income Statement**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Description	Foreign Amount	Amount
Management Fee Income	356,183	489,499
Other Income	22,702	31,199

TY 2008 Other Income Statement

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Description	Foreign Amount	Amount
Commission Income	500,241	687,477

TY 2008 Other Income Statement

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Description	Foreign Amount	Amount
Commission Income	7,552	6,746

TY 2008 Other Income Statement

Name: OCLC Online Computer Library Center Inc

EIN: 31-0734115

Description	Foreign Amount	Amount
Management Fee Income	40,291	55,372

TY 2008 Other Income Statement**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Description	Foreign Amount	Amount
Commission Income	70,616	97,047
Software Development Service	320,567	440,552

TY 2008 Other Income Statement**Name:** OCLC Online Computer Library Center Inc**EIN:** 31-0734115

Description	Foreign Amount	Amount
commission Income	909,664	1,469,953
management Fee Income	152,434	246,323
software Development Service	462,899	748,012

Additional Data

Software ID:

Software Version:

EIN: 31-0734115

Name: OCLC Online Computer Library Center Inc

Form 990, Part VII - Section Aaa

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W- 2/1099MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual Trustee or Director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Larry P Alford , Chair	15 00	X						73,750	0	0
Ed Barry , Vice Chair	10 00	X						35,500	0	0
William J Crowe , Trustee	10 00	X						56,304	0	0
Lizabeth A Wilson , Trustee	10 00	X						60,539	0	0
Robert A Seal , Trustee	8 00	X						39,500	0	0
Jerry W Stephens , Trustee	5 00	X						41,996	0	0
Sandra Yee , Trustee	5 00	X						3,833	0	0
Kathleen Imhoff , Trustee	5 00	X						4,666	0	0
David Lauer , Trustee	8 00	X						34,000	0	0
Bruce Newell , Trustee	8 00	X						35,831	0	0
Mary M Farrell , Trustee	8 00	X						50,496	0	0
Ralph Frasier , Trustee	5 00	X						35,219	0	0
Jane N Ryland , Trustee	8 00	X						37,498	0	0
David Roselle , Trustee	8 00	X						36,996	0	0
Anthony Ferguson , Trustee	10 00	X						3,833	0	0
Elisabeth Niggemann , Trustee	8 00	X						35,330	0	0
Robert L Jordan , President & CEO	55 00	X		X				601,762	0	790,021
Rick J Schwieterman , Executive VP and CFO	55 00			X				475,627	0	46,166
James T Houfek , VP & General Counsel	45 00			X				263,145	0	36,240
Karen Calhoun , VP Worldcat/Metadata Ser	50 00			X				190,402	0	18,199
Bruce Crocco , VP Libr Svcs for America	50 00			X				207,627	0	27,868
Lorcan Dempsey , VP Research & Strategist	40 00			X				274,318	0	45,785
Catherine De Rosa , VP Global Marketing	40 00			X				289,976	0	40,943
Gary Houk , VP, Corp Info Technology	40 00			X				198,526	0	19,362
Jim Michalko , VP RLG Programs	40 00			X				252,140	0	33,019
Robin Murray , VP, Global Product Mgmt	50 00			X				0	278,269	11,099
George Needham , VP Global Councils	50 00			X				230,793	0	30,790
William Nilges , VP Business Development	40 00			X				211,391	0	31,913
Tammi Spayde , VP, Human Resources	50 00			X				206,349	0	33,619
Michael Teets , VP Product Architecture	50 00			X				215,391	0	33,404

Form 990, Part VII - Section Aaa

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W- 2/1099MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual Trustee or Director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Andrew Wang , VP, OCLC Asia Pacific	50 00			X				187,173	0	31,077
Greg Zick , VP, Global Engineering	40 00			X				187,733	0	34,121
Gene Oliver , Exec Dir Systems Mgmt	45 00				X			169,863	0	40,281
Daniel Boivin , Director, OCLC Canada	45 00					X		155,174	0	11,676
Tom Hickey , Chief Scientist	40 00					X		196,004	0	33,702
Sondra Kowaluk , Corporate Controller	45 00					X		181,549	0	31,753
Andrew Pace , Ex Dir Network Libr Svc	40 00					X		175,526	0	16,968
Gary Perlman , Consult Resch Scientist	40 00					X		189,904	0	12,931
Tom Shaughnessy , Former Trustee	0 00						X	33,662	0	0

Form 990, Part VIII - Statement of Revenue - 2a - 2g Program Service Revenue -

	Business Code	(A) Total Revenue	(B) Related or Exempt Function Revenue	(C) Unrelated Business Revenue	(D) Revenue Excluded from Tax under IRC 512, 513, or 514
a Metadata Services	519,100	82,887,575	82,887,575		
b Resource Share Svcs	519,100	42,652,835	42,652,835		
c Reference Services	519,100	33,704,054	33,704,054		
d E-Book & Audio Books	519,100	20,074,694	20,074,694		
e Digital / Preservation	519,100	9,002,220	9,002,220		

Form 990, Part I, Line 1 - Briefly describe the Organization's mission or most significant activities:

Establish, maintain and operate a computerized library network and to (continued on Schedule O) 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 the 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.

Form 990, Part III, Line 1 - Briefly describe the organization's mission:

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 the 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.