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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)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

2009

Open to Public Inspection

A For the 2009 calendar year, or tax year beginning 07-01-2009 and ending 06-30-2010

B Check if applicable
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Terminated
- ☐ 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

Doing Business As

Number and street (or P O box if mail is not delivered to street address) | Room/suite
6565 Kilgour Place

City or town, state or country, and ZIP + 4
Dublin, OH 43017

D Employer identification number
31-0734115

E Telephone number
(614) 764-6000

G Gross receipts $ 350,145,337

F Name and address of principal officer
RICK J SCHWIETERMAN
6565 Kilgour Place
Dublin, OH 43017

H(a) Is this a group return for affiliates? ☐ Yes ☑ No

H(b) **Are all affiliates included?** ☐ Yes ☐ No
If "No," attach a list (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status ☑ 501(c) (3) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

J **Website:** ▶ OCLC ORG

K Form 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
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

2 Check this box ▶☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3	Number of voting members of the governing body (Part VI, line 1a)	3	16
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	15
5	Total number of employees (Part V, line 2a)	5	1,161
6	Total number of volunteers (estimate if necessary)	6	0
7a	Total gross unrelated business revenue from Part VIII, column (C), line 12	7a	928,337
b	Net unrelated business taxable income from Form 990-T, line 34	7b	-182,602

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	6,906,824	5,266,183
	9	Program service revenue (Part VIII, line 2g)	198,300,276	188,879,342
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	-24,129,753	39,293,465
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	3,862,337	3,513,988
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	184,939,684	236,952,978
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	193,922	218,517
	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)	94,988,239	96,418,596
	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)	117,291,468	115,247,725
	18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	212,473,629	211,884,838
	19	Revenue less expenses Subtract line 18 from line 12	-27,533,945	25,068,140

			Beginning of Current Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	335,992,644	344,228,778
	21	Total liabilities (Part X, line 26)	158,882,580	134,641,120
	22	Net assets or fund balances Subtract line 21 from line 20	177,110,064	209,587,658

Part II Signature Block

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

Sign Here

Signature of officer | Date 2011-05-13

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 identifying number (see instructions)
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

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

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 501(c)(4) organizations and section 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 $ 197,116,467 including grants of $) (Revenue $ 190,012,271)

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 170 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 197 million records and more than 1 6 billion location listings to the database, which spans more than 5,000 years of recorded knowledge and grows steadily - seven new records are added every second 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 389 3 million WorldCat searches on internet 150 million Cataloging records added to WorldCat database 57 8 million Location listings added to WorldCat database 160 million Online interlibrary loans 10 2 million End-user reference search transactions (FirstSearch) 65 million Dewey Decimal Classification - Edition 22 1,200 Dewey Decimal Classification - Abridged Edition 900

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 ▶$ 197,116,467

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 similar funds or 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, directly or through a related organization, hold assets in term, permanent,or quasi-endowments? *If "Yes," complete Schedule D, Part V*	10		No
11	Is the organization's answer to any of the following questions "Yes"? *If so,complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.*	11	Yes	
	• Did the organization report an amount for land, buildings, and equipment in Part X, line10? *If "Yes," complete Schedule D, Part VI.*			
	• Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII.*			
	• Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII.*			
	• Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX.*			
	• Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X.*			
	• Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? *If "Yes," complete Schedule D, Part X.*			
12	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI, XII, and XIII*	12		No
12A	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional* — 12A Yes (Yes / No)			
13	Is the organization a school 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 United States?	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 United States? *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 U S ? *If "Yes," complete Schedule F, Part II*	15	Yes	
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 U S ? *If "Yes," complete Schedule F, Part III*	16	Yes	
17	Did the organization report a total of more than $15,000, of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I*	17		No
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions 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 of gross income from gaming activities 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

Part IV Checklist of Required Schedules *(continued)*

21	Did the organization report more than $5,000 of grants and other assistance to governments and organizations in the United States 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 of grants and other assistance to individuals in the United States 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, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *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 line 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		No
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	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *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, substantial contributor, or a grant selection committee member, or to a person related to such an individual? *If "Yes," complete Schedule L, Part III*	27		No
28	Was the organization a party to a business transaction with one of the following parties? (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	28b	Yes	
c	An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or owner? *If "Yes," complete Schedule L, Part IV*	28c	Yes	
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	29		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		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*	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? *If "Yes," complete Schedule R, Part I*	33		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*	34	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*	35	Yes	
36	**Section 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*	36		No
37	Did the organization conduct more than 5% 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*	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? **Note.** All Form 990 filers are required to complete Schedule O	38	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance

				Yes	No
1a	Enter the number reported in Box 3 of Form 1096, *Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable*	**1a** 243			
b	Enter the number of Forms W-2G included in line 1a *Enter -0-* if not applicable	**1b** 0			
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, *Transmittal of Wage and Tax Statements* filed for the calendar year ending with or within the year covered by this return	**2a** 1,161			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? **Note:** If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return (see instructions)		**2b**	Yes	
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 ▶CA , MX , CH 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 line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		**5c**		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and 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	**Organizations that may receive deductible contributions under section 170(c).**				
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?		**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	**Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.** Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		**8**		
9	**Sponsoring organizations maintaining donor advised funds.**				
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	**Section 501(c)(7) organizations.** 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	**Section 501(c)(12) organizations.** 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	**Section 4947(a)(1) non-exempt charitable trusts.** 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** For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

				Yes	No
1a	Enter the number of voting members of the governing body	**1a** 16			
b	Enter the number of voting members that are independent	**1b** 15			
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**	Yes	
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	
b	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				
a	The governing body?		**8a**	Yes	
b	Each committee with authority to act on behalf of the governing body?		**8b**	Yes	
9	Is there any officer, director, 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		**9**		No

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

			Yes	No
10a	Does the organization have local chapters, branches, or affiliates?	**10a**		No
b	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?	**10b**		
11	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	**11**	Yes	
11A	Describe in Schedule O the process, if any, used by the organization to review the Form 990			
12a	Does the organization have a written conflict of interest policy? *If "No," go to line 13*	**12a**	Yes	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	**12b**	Yes	
c	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?			
a	The organization's CEO, Executive Director, or top management official	**15a**	Yes	
b	Other officers or key employees of the organization	**15b**	Yes	
	If "Yes" to line a or b, describe the process in Schedule O (See instructions)			
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
b	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

Part VII **Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

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

1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year Use Schedule J-2 if additional space is needed

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees See instructions for definition of "key employee "
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons

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

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(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			
See add'l data										

1b Total . . . . ▶	8,811,953	174,757	676,325

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 in reportable compensation from the organization ▶178

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

Section B. Independent Contractors

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
LEO BURNETT USA INC 35 WEST WACKER CHICAGO, IL 60601	Grant related marketing for libraries	1,761,746
INDEX DATA LLC 10 FIELDSTONE DRIVE WINCHESTER, MA 01890	SOFTWARE CONSULTING	971,000
KPMG LLP P O BOX 120001 DALLAS, TX 75312	CONSULTING SERVICES	321,821
WORKSTATE CONSULTING 780 KING AVENUE SUITE 101 COLUMBUS, OH 43212	SOFTWARE CONSULTING	282,760
LIBRARY OF CONGRESS 101 INDEPENDENCE AVENUE SE WASHINTON, DC 20540	EDITORIAL SERVICES	234,687

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 in compensation from the organization ▶14

Part VIII Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns . . 1a					
	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 1f	5,266,183				
	g	Noncash contributions included in lines 1a-1f $					
	h	**Total.** Add lines 1a-1f . . . . ▶		5,266,183			
Program Service Revenue			Business Code				
	2a	MetaData Services	519,100	85,474,438	85,474,438		
	b	Resource Share Svcs	519,100	44,258,798	44,258,798		
	c	Reference Services	519,100	31,407,640	31,407,640		
	d	E-Book & Audio Books	519,100	14,039,977	14,039,977		
	e	Digital / Preservation	519,100	4,950,491	4,950,491		
	f	All other program service revenue		8,747,998	8,747,998		
	g	**Total.** Add lines 2a–2f . . . . ▶		188,879,342			
Other Revenue	3	Investment income (including dividends, interest and other similar amounts) . . . . . ▶		5,968,796			5,968,796
	4	Income from investment of tax-exempt bond proceeds . . ▶					
	5	Royalties . . . . ▶					
			(i) Real / (ii) Personal				
	6a	Gross Rents					
	b	Less rental expenses					
	c	Rental income or (loss)					
	d	Net rental income or (loss) . . . . ▶					
			(i) Securities / (ii) Other				
	7a	Gross amount from sales of assets other than inventory	(i) 116,304,376 / (ii) 29,215,208				
	b	Less cost or other basis and sales expenses	(i) 105,041,141 / (ii) 7,153,774				
	c	Gain or (loss)	(i) 11,263,235 / (ii) 22,061,434				
	d	Net gain or (loss) . . . . ▶		33,324,669			33,324,669
	8a	Gross income from fundraising events (not including $ of contributions reported on line 1c) See Part IV, line 18 . . . 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 . . . a					
	b	Less direct expenses . . . b					
	c	Net income or (loss) from gaming activities . . . ▶					
	10a	Gross sales of inventory, less returns and allowances . a	2,130,373				
	b	Less cost of goods sold . . b	997,444				
	c	Net income or (loss) from sales of inventory . . ▶		1,132,929	1,132,929		
		Miscellaneous Revenue	Business Code				
	11a	Space Rentals	531,120	1,452,722			1,452,722
	b	Misc revenue-Unrelate	900,099	928,337		928,337	
	c						
	d	All other revenue					
	e	**Total.** Add lines 11a–11d . . . . . . ▶		2,381,059			
	12	**Total revenue.** See Instructions . . . ▶		236,952,978	190,012,271	928,337	40,746,187

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	156,670	156,670		
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	61,847	61,847		
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	5,410,825	2,668,273	2,742,552	
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	71,576,365	66,802,615	4,773,750	
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	5,463,520	5,155,177	308,343	
9	Other employee benefits	7,867,409	7,056,098	811,311	
10	Payroll taxes	6,100,477	5,703,251	397,226	
11	Fees for services (non-employees)				
a	Management				
b	Legal	630,717	35,393	595,324	
c	Accounting	266,026		266,026	
d	Lobbying				
e	Professional fundraising *See Part IV, line 17* . .				
f	Investment management fees	989,032		989,032	
g	Other	10,144,314	9,466,090	678,224	
12	Advertising and promotion	140,733	140,733		
13	Office expenses	3,041,351	2,949,041	92,310	
14	Information technology	4,679,495	4,443,038	236,457	
15	Royalties . .	14,738,985	14,738,985		
16	Occupancy	6,696,360	5,981,868	714,492	
17	Travel	4,649,241	4,197,560	451,681	
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	779,448	771,520	7,928	
20	Interest	2,146,043	2,146,043		
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	21,291,537	21,287,745	3,792	
23	Insurance	523,659		523,659	
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	15,393,892	15,393,892		
b	Marketing	9,340,491	9,340,491		
c	Program Incentives	7,677,051	7,677,051		
d	Cataloging Credits	5,003,894	5,003,894		
e	Other Than Temporary In	1,686,058	1,686,058		
f	All other expenses	5,429,398	4,253,134	1,176,264	
25	**Total functional expenses.** Add lines 1 through 24f	211,884,838	197,116,467	14,768,371	0
26	**Joint costs.** Check here ☐ 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) Beginning of year		(B) End of year
Assets	1	Cash—non-interest-bearing		6,050	1	4,468
	2	Savings and temporary cash investments		22,030,905	2	13,321,411
	3	Pledges and grants receivable, net			3	978,861
	4	Accounts receivable, net		36,494,540	4	29,283,979
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L		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) Complete Part II of Schedule L			6	
	7	Notes and loans receivable, net			7	561,790
	8	Inventories for sale or use		4,085,922	8	4,347,294
	9	Prepaid expenses and deferred charges		9,212,747	9	6,603,394
	10a	Land, buildings, and equipment cost or other basis *Complete Part VI of Schedule D*	10a 111,222,835			
	b	Less accumulated depreciation	10b 66,697,181	49,758,046	10c	44,525,654
	11	Investments—publicly traded securities		124,628,262	11	160,220,327
	12	Investments—other securities See Part IV, line 11		9,793,665	12	10,797,347
	13	Investments—program-related See Part IV, line 11			13	
	14	Intangible assets		60,721,376	14	56,279,784
	15	Other assets See Part IV, line 11		19,211,131	15	17,254,469
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)		335,992,644	16	344,228,778
Liabilities	17	Accounts payable and accrued expenses		20,044,138	17	19,321,787
	18	Grants payable			18	
	19	Deferred revenue		52,953,270	19	28,198,176
	20	Tax-exempt bond liabilities		53,290,273	20	53,635,777
	21	Escrow or custodial account liability *Complete Part IV of Schedule D*			21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons *Complete Part II of Schedule L*			22	
	23	Secured mortgages and notes payable to unrelated third parties			23	
	24	Unsecured notes and loans payable to unrelated third parties			24	
	25	Other liabilities Complete Part X of Schedule D		32,594,899	25	33,485,380
	26	**Total liabilities.** Add lines 17 through 25		158,882,580	26	134,641,120
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		177,110,064	32	209,587,658
	33	Total net assets or fund balances		177,110,064	33	209,587,658
	34	Total liabilities and net assets/fund balances		335,992,644	34	344,228,778

Part XI Financial Statements and Reporting

			Yes	No
1	Accounting method used to prepare the Form 990 ☐ Cash ☑ Accrual ☐ Other ______ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O			
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	Yes	
c	If "Yes," to 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? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O . . .	2c	Yes	
d	If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both ☐ Separate basis ☑ Consolidated basis ☐ Both consolidated and separated basis			
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? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits . .	3b		

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SCHEDULE A
(Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ **Attach to Form 990 or Form 990-EZ.** ▶ **See separate instructions.**

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

Employer identification number
31-0734115

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is (For lines 1 through 11, check only one box)

1 ☐ A church, convention of churches, or association of churches **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).**

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).**

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?

		Yes	No
(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?	**11g(i)**		
(ii) a family member of a person described in (i) above?	**11g(ii)**		
(iii) a 35% controlled entity of a person described in (i) or (ii) above?	**11g(iii)**		

h Provide the following information about the supported organization(s)

(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? Yes	No	(v) Did you notify the organization in col (i) of your support? Yes	No	(vi) Is the organization in col (i) organized in the U S ? Yes	No	(vii) Amount of support?
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.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(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 lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 **Public Support.** Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(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 (Explain in Part IV) Do not include gain or loss from the sale of capital assets						
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** ▶☐

Section C. Computation of Public Support Percentage

14 Public Support Percentage for 2009 (line 6 column (f) divided by line 11 column (f)) **14**

15 Public Support Percentage for 2008 Schedule A, Part II, line 14 **15**

16a **33 1/3% support test—2009.** 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% support test—2008.** 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—2009.** 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—2008.** 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 a box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions ▶☐

Part III **Support 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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")	3,919,418	8,570,201	14,129,999	6,906,824	5,266,183	38,792,625
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	178,167,717	193,101,623	196,988,335	201,302,146	191,009,715	960,569,536
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 through 5	182,087,135	201,671,824	211,118,334	208,208,970	196,275,898	999,362,161
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	2,860,789	6,363,241	12,462,867	6,372,377	4,939,971	32,999,245
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year	6,750,633	5,173,960	6,331,650	4,461,101	4,603,165	27,320,509
c Add lines 7a and 7b	9,611,422	11,537,201	18,794,517	10,833,478	9,543,136	60,319,754
8 **Public Support** (Subtract line 7c from line 6)						939,042,407

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6	182,087,135	201,671,824	211,118,334	208,208,970	196,275,898	999,362,161
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	4,127,317	5,594,482	5,915,373	7,472,163	7,421,518	30,530,853
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975	8,729					8,729
c Add lines 10a and 10b	4,136,046	5,594,482	5,915,373	7,472,163	7,421,518	30,539,582
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)	186,223,181	207,266,306	217,033,707	215,681,133	203,697,416	1,029,901,743

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** ☐

Section C. Computation of Public Support Percentage

15 Public Support Percentage for 2009 (line 8 column (f) divided by line 13 column (f))	15	91 180 %
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	91 340 %

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2009** (line 10c column (f) divided by line 13 column (f))	17	2 970 %
18 Investment income percentage from **2008** Schedule A, Part III, line 17	18	2 630 %

19a **33 1/3% support tests—2009.** 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% support tests—2008.** 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.** Supplemental Information. Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. See instructions

SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization	Employer identification number
OCLC Online Computer Library Center Inc	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 for any other purpose conferring 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 a 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	2a	
b	Total acreage restricted by conservation easements	2b	
c	Number of conservation easements on a certified historic structure included in (a)	2c	
d	Number of conservation easements included in (c) acquired after 8/17/06	2d	

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, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting and enforcing conservation easements during the year ▶ ____________

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation 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
d ☐ Loan or exchange programs
b ☐ Scholarly research
e ☐ Other
c ☐ Preservation for future generations

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 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 the arrangement in Part XIV and complete the following table

			Amount
c	Beginning balance	1c	
d	Additions during the year	1d	
e	Distributions during the year	1e	
f	Ending balance	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

			Yes	No
	(i) unrelated organizations	3a(i)		
	(ii) related organizations	3a(ii)		
b	If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	3b		

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) Accumulated depreciation	(d) Book value
1a Land		9,765,121		9,765,121
b Buildings		55,771,552	34,838,528	20,933,024
c Leasehold improvements		1,135,294	368,032	767,262
d Equipment		44,550,868	31,490,621	13,060,247
e Other				
Total. Add lines 1a-1e *(Column (d) should equal Form 990, Part X, column (B), line 10(c).)* ▶				44,525,654

Part VII Investments—Other Securities. See Form 990, Part X, line 12.

(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		
Closely-held equity interests		
Other		
Total. *(Column (b) should equal Form 990, Part X, col (B) line 12)* ▶		

Part VIII Investments—Program Related. See Form 990, Part X, line 13.

(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)* ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	(b) Book value
Other Assets	6,257,867
Investment in Affiliates	10,996,602
Total. *(Column (b) should equal Form 990, Part X, col.(B) line 15.)* . . . . ▶	17,254,469

Part X Other Liabilities. See Form 990, Part X, line 25.

1 (a) Description of Liability	(b) Amount
Federal Income Taxes	
Deferred Retirement	1,148,793
Post Retirement Benefits	12,550,406
Members Subscription Balances	16,234,585
Other Liabilities	3,551,596
Total. *(Column (b) should equal Form 990, Part X, col (B) line 25)* ▶	33,485,380

2. Fin 48 Footnote In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48

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	Other losses	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 IV, 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 Also complete this part to provide any additional information

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) This is now codified as Accounting Standards Codification (ASC) 740-10 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, 2010 and 2009, in accordance with ASC 740-10 Based on this evaluation, OCLC determined that there was no material impact to the Corporation's consolidated financial statements as a result of the adoption of ASC 740-10

SCHEDULE F (Form 990)

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

► Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.
► Attach to Form 990. ► See separate instructions.

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

Employer identification number
31-0734115

Part I **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 14b.

1 **For grantmakers.** 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 **For grantmakers.** Describe in Part IV the organization's procedures for monitoring the use of grant funds outside the United States

3 Activites per Region (Use Schedule F-1 (Form 990) if additional space is needed)

(a) Region	**(b)** Number of offices in the region	**(c)** Number of employees or agents in region	**(d)** Activities conducted in region (by type) (i e , fundraising, program services, grants to recipients located in the region)	**(e)** If activity listed in (d) is a program service, describe specific type of service(s) in region	**(f)** Total expenditures for region
East Asia and the Pacific	1	4	Program Services	REPRESENTATIVE OFFICE PROVIDING INFORMATION ABOUT OCLC SERVICES TO LIBRARIES IN CHINA	195,947
NORTH AMERICA (OUTSIDE USA)	2	8	Program services	Offices providing information about OCLC services to libraries	980,210
NORTH AMERICA (OUTSIDE USA)	1	37	PROGRAM SERVICES	PROVIDING TECHNICAL SERVICES TO LIBRARIES	2,005,079
EAST Asia and the Pacific			ONE TRUSTEE ATTENDED AN OCLC REGIONAL COUNCIL MEETING		1,647
EUROPE			TWO TRUSTEES ATTENDEDAN OCLC REGIONAL COUNCIL MEETING		5,621
			See Schedule R for excluded affiliates outside the US		
Totals . . . . . . ►	4	49			3,188,504

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 (Form 990) if additional space is needed.

1 (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)
		North America (Outside USA)	Library and information science research grant	11,220	check			

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter . . . . . ▶ 1

3 Enter total number of other organizations or entities . . . . ▶ 0

Part III **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 16. Use Schedule F-1 (Form 990) if additional space is needed.

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of non-cash assistance	(g) Description of non-cash assistance	(h) Method of valuation (book, FMV, appraisal, other)
Fellowships for educational program for early career librarians from developing countries	Sub-Saharan Africa	1	400	Cash stipend of $100 per week	7,247	Travel, lodging and meals to visit OCLC's offices in the US and Europe and to visit various libraries in both regions so that they can observe and learn about library operations in other countries as well as governance models for international library cooperation	Actual costs expended
Fellowships for educational program for early career librarians from developing countries	Russia and Newly Independent States	1	400	cash stipend of $100 per week	10,470	Travel, lodging and meals to visit OCLC's offices in the US and Europe and to visit various libraries in both regions so that they can observe and learn about library operations in other countries as well as governance models for international library cooperation	Actual costs expended
Fellowships for educational program for early career librarians from developing countries	South Asia	1	400	cash stipend of $100 per week	7,286	Travel, lodging and meals to visit OCLC's offices in the US and Europe and to visit various libraries in both regions so that they can observe and learn about library operations in other countries as well as governance models for international library cooperation	Actual costs expended
Fellowships for educational program for early career librarians from developing countries	MIDDLE EAST AND NORTH AFRICA	1	400	cash stipend of $100 per week	6,981	Travel, lodging and meals to visit OCLC's offices in the US and Europe and to visit various libraries in both regions so that they can observe and learn about library operations in other countries as well as governance models for international library cooperation	actual costs expended
Fellowships for educational program for early career librarians from developing countries	EAST ASIA AND THE PACIFIC	1	400	cash stipend of $100 per week	9,742	Travel, lodging and meals to visit OCLC's offices in the US and Europe and to visit various libraries in both regions so that they can observe and learn about library operations in other countries as well as governance models for international library cooperation	actual costs expended
Fellowships for educational program for early career librarians from developing countries	CENTRAL AMERICA AND CARIBBEAN	1	400	cash stipend of $100 per week	6,501	Travel, lodging and meals to visit OCLC's offices in the US and Europe and to visit various libraries in both regions so that they can observe and learn about library operations in other countries as well as governance models for international library cooperation	actual costs expended

Part IV Supplemental Information

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

Identifier	ReturnReference	Explanation
Procedure for Monitoring Grants Outside the U S		Schedule F, 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

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Schedule I (Form 990)

Department of the Treasury
Internal Revenue Service

Grants and Other Assistance to Organizations, Governments and Individuals in the United States

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

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

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" to 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 (Form 990) if additional space is needed . . . ▶ ☐

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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	362166947	501(c)(3)	24,850				Operating support and funding for the Mann Citation Award
Association of Research Libraries21 Dupont Circle Washington, DC 20036	520784198	501(c)(3)	10,000				Operating support
Black Caucus of American Library AssociationP O Box 174 New York, NY 10159	521892263	501(c)(3)	7,000				Operating support
FSU Research Foundation 874 Traditions Way Tallahassee, FL 32306	593211153	501(c)(3)	14,900				Library and information science research grant
Indiana University620 union drive indianapolis, IN 46202	356001673	115	14,520				Library and information science research grant
Tech Columbus1275 Kinnear Road columbus, OH 43215	311658220	501(c)(3)	7,500				operating support
United Way of Central Ohio 360 South Third Street columbus, OH 43215	314393712	501(c)(3)	10,000				Operating Support

2 Enter total number of section 501(c)(3) and government organizations . . . ▶ 7

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" to 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.

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

Schedule J (Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
▶ Complete if the organization answered "Yes" to Form 990, Part IV, question 23.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2009

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 appropiate 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 any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement orprovision of all the expenses described above? If "No," complete Part III to explain	**1b**	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?	**2**	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 with respect to the filing organization or a related organization			
a	Receive a severance payment or change-of-control payment?	**4a**	Yes	
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**	Yes	
c	Participate in, or receive payment from, an equity-based compensation arrangement?	**4c**		No
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III			
	Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.			
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?	**5a**	Yes	
b	Any related organization?	**5b**	Yes	
	If "Yes," to line 5a or 5b, describe in Part III			
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?	**6a**	Yes	
b	Any related organization?	**6b**	Yes	
	If "Yes," to line 6a or 6b, describe in Part III			
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	**7**	Yes	
8	Were any amounts reported in Form 990, Part VII, paid or accured 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	**8**		No
9	If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?	**9**		

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)** Retirement and other 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 reportable compensation				
See Additional Data Table								

Part III Supplemental Information

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

Identifier	Return Reference	Explanation
	Part I, Line 1a	Travel for companions Lorcan Dempsey, Vice President, Programs, Research & Chief Strategist, is provided an allowance for occasional, personal travel to and from his home in the United Kingdom for himself and his family This allowance is fully included in taxable compensation Discretionary Spending Account Robert L Jordan, President and CEO, receives a $10,000 tax return preparation/financial planning allowance and a $14,400 automobile allowance for which he is not accountable to the organization and both are fully included in taxable income All US Vice Presidents except Lorcan Dempsey receive a discretionary tax return preparation/financial planning allowance of $600 to be used as they desire All these allowances are included in taxable compensation Health or social club dues Robert L Jordan, President and CEO and Rick J Schwieterman, Executive Vice President and CFO each have country club memberships For Mr Jordan, dues are either paid directly by OCLC or paid by Mr Jordan and reimbursed by OCLC Business expenses incurred are reimbursed under an accountable plan Dues paid or reimbursed by OCLC are reported as taxable compensation to the extent of reported personal use by Mr Jordan For Mr Schwieterman, OCLC pays personal charges and dues up to $12,000 annually An allocable portion of the dues based on personal use plus actual personal charges are reported as taxable compensation Business expenses incurred are reimbursed under an accountable plan
	Part I, Line 4a	Part I, Line 4a Stanley Wood, former Executive Director, WebJunction, received a severance payment of $50,819 which is included as part of Other Compensation in Schedule J, Part II, Column Biii Part I, Line 4b Robert L Jordan, President and CEO, participated in a supplemental nonqualified retirement plan as described in Section 457(f) During the calendar year 2009, he received payouts of $2,903,310 from this plan This amount is included as part of Other Compensation in Schedule J, Part II, Column Biii Since this compensation was reported as Deferred Compensation in previous years, it is also shown as previously reported compensation in Column F of Schedule J, Part II
	Part I, Line 5	OCLC maintains three different incentive compensation plans that are based in part on the global performance of OCLC and its subsidiaries Subsidiary revenues and expenses are not included in this return The plans are the Sales Incentive Plan (SIP), the Management Incentive Plan (MIP) and the Long-Term Incentive Plan (LTIP) Officers are participants in both the MIP and the LTIP All performance awards for the CEO and all other officers are approved by the OCLC Board of Trustees All incentive plans are regularly reviewed by outside compensation consultants, the last such occurring within the last year The SIP is for employees responsible for the library sales program and is based on achieving specific product-line sales targets The MIP is a performance-based compensation program available for management personnel (total of 130) and is based on a weighted average of performance objectives All participants have at least a 20 % weighting for cooperative-wide objectives for revenue and earnings (excess of revenues over expenses) and 10 % for inclusion Some MIP participants may also have a weighting for revenues and earnings of specific product segments of OCLC for which they have responsibility All participants have up to an 80 % weighting for specific individual objectives for the plan year The amount of compensation for non-officer participants meeting these individual objectives are recommended by the supervising management and approved by the CEO The LTIP is a performance-based compensation program for officers The OCLC Board of Trustees establishes metrics that indicate performance in three areas Distinctive Impact, Lasting Endurance and Superior Performance These performance measures include long-term revenue goals and earnings goals using a five-year rolling average and other strategic objectives of the cooperative These are long-term goals which are generally established three years before the performance measurement date LTIP goals are set each year for new three-year targets Cooperative-wide objectives (whether for revenues or earnings) are based on the audited results for OCLC and its 100 % owned subsidiaries
	Part I, Line 6	See explanation for Line 5
	Part I, Line 7	See explanation for Line 5
Supplemental Information	Part III	Explanation for Schedule J, Part II, Column F Column F of Schedule J reports distributions from a 457f plan which were reported in previous years as deferred compensation
Supplemental Information	Part III	Description of OCLC Management Savings Plan Effective July 1, 1997, and extending through April 30, 2002, certain employees and trustees elected to participate in the OCLC Management Savings Plan (the Plan), a non-qualified incentive benefit program for certain employees and trustees who contributed to the success of OCLC Effective May 1, 2002, the Plan was frozen and no additional contributions have been, or will be, accepted Earnings on existing balances are distributed annually to participants and included on W-2s and 1099s in the year of distribution Under the Plan, participants receive the right to purchase mutual fund shares for a fixed price Such right can, generally, be exercised at any time within a 20-year period following the date of grant However, in the case of a participants death, rights held by such participant must be exercised within six months from the date of death, and in the case of termination of employment (except for retirement) rights held by the terminated participant must be exercised within six months of the date of termination (unless extended by the President) Compensation income attributable to rights granted under the Plan, for tax reporting purposes, is neither determinable at the time of grant thereof, nor at OCLCs fiscal year end, if still outstanding More specifically, it is only upon exercise of one of these rights that a participant must recognize compensation income, for tax reporting purposes During the calendar year falling within the fiscal year that is the subject of this information return, one of the participants, who is reported in this information return, exercised the rights granted under the Plan and that income is disclosed in this return Other than earnings on existing balances which have been distributed, no other income is reflected in the schedule provided above, with respect to those individuals listed therein who are participants in the Plan Any future compensation amounts ultimately realized from exercise of rights granted under the Plan, will be appropriately disclosed as compensation in OCLCs information return for the year of exercise Participants in the Plan reported on this return Ralph Frasier Trustee Lizabeth A Wilson Trustee Robert L Jordan President & CEO Rick J Schwieterman Executive VP and CFO James T Houfek VP & General Counsel Lorcan Dempsey VP, Research & Strategist Catherine De Rosa VP, Global Marketing George Needham VP, Global Councils Tom Shaughnessy Former Trustee

Schedule K (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information on Tax Exempt Bonds

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 24a. Provide descriptions, explanations, and any additional information in Schedule O (Form 990).
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

Employer identification number
31-0734115

Part I Bond Issues

	(a) Issuer Name	(b) Issuer EIN	(c) CUSIP #	(d) Date Issued	(e) Issue Price	(f) Description of Purpose	(g) Defeased Yes	(g) Defeased No	(h) On Behalf of Issuer Yes	(h) On Behalf of Issuer 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	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	
C	Columbus-Franklin County Finance Authority	57-1239430	NOCUSIPNO	08-10-2009	30,000,000	To refund 1998 Bonds,acquire office systems, equipment and databases		X	X	

Part II Proceeds

		A	B	C	D	E
1	Total proceeds of issue	26,223,310	20,000,000	30,000,000		
2	Gross proceeds in reserve funds					
3	Proceeds in refunding or defeasance escrows	17,390,910		17,523,444		
4	Other unspent proceeds					
5	Issuance costs from proceeds	233,016		161,760		
6	Working capital expenditures from proceeds					
7	Capital expenditures from proceeds	8,599,384	20,000,000	12,314,796		
8	Year of substantial completion	2003	2008	2009		

		A Yes	A No	B Yes	B No	C Yes	C No	D Yes	D No	E Yes	E No
9	Were the bonds issued as part of a current refunding issue?	X			X	X					
10	Were the bonds issued as part of an advance refunding issue?		X		X		X				
11	Has the final allocation of proceeds been made?	X		X		X					
12	Does the organization maintain adequate books and records to support the final allocation of proceeds?	X		X		X					

Part III Private Business Use

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

Part III Private Business Use *(Continued)*

		A Yes	A No	B Yes	B No	C Yes	C No	D Yes	D No	E Yes	E No
3a	Are there any management or service contracts with respect to the financed property which may result in private business use?		X		X		X				
3b	Are there any research agreements with respect to the financed property which may result in private business use?		X		X		X				
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?		X		X		X				
4	Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government ▶		0 %		0 %		0 %				
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 section 501(c)(3) organization, or a state or local government ▶		0 %		0 %		0 %				
6	Total of lines 4 and 5		0 %		0 %		0 %				
7	Has the organization adopted management practices and procedures to ensure the post-issuance compliance of its tax-exempt bond liabilities?	X		X		X					

Part IV Arbitrage

		A Yes	A No	B Yes	B No	C Yes	C No	D Yes	D No	E Yes	E No
1	Has a Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate, been filed with respect to the bond issue?		X		X		X				
2	Is the bond issue a variable rate issue?		X		X		X				
3a	Has the organization or the governmental issuer identified a hedge with respect to the bond issue on its books and records?		X		X		X				
b	Name of provider										
c	Term of hedge										
4a	Were gross proceeds invested in a GIC?		X		X		X				
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?		X		X		X				
6	Did the bond issue qualify for an exception to rebate?	X		X		X					

Schedule L
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Transactions with Interested Persons

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V lines 38a or 40b.**
▶ **Attach to Form 990 or Form 990-EZ.** ▶**See separate instructions.**

OMB No 1545-0047

2009

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).

Complete if the organization 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.

Complete if the organization 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? To	From	(c) Original principal amount	(d) Balance due	(e) In default? Yes	No	(f) Approved by board or committee? Yes	No	(g) Written agreement? 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.

Complete if the organization 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.

Complete if the organization 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	See Schedule O	120,547	Employment Family member of an OCLC officer		No
Sonya Oliver	See Schedule O	88,103	Employment Family member of an OCLC key employee		No
KNOVEL INC	See Schedule O	118,624	SALES CATALOGING SERVICES sold to entity with directors on OCLC Board of Trustees		No

Additional Data

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

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93493133003211

SCHEDULE O (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

Complete to provide information for responses to specific questions on Form 990 or to provide any additional information.
▶ Attach to Form 990.

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization
OCLC Online Computer Library Center Inc

Employer identification number
31-0734115

Identifier	Return Reference	Explanation
Form 990, Part III, line 3	Changes in Program Services	During the year, OCLC ceased providing two program services for libraries providing electronic books and electronic audio books and preservation services in microfilm and digital formats Both operations were sold to unrelated third parties who are continuing to provide the services to libraries

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 2		Two current trustees (Edward Barry and John Patrick) are both board members of Knovel, Inc

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 6		Membership in OCLC is open to any library or other memory institution that embraces the OCLC values of collaboration and sharing Institutions worldwide become members by contractually agreeing to contribute intellectual content or share resources Members may include libraries, museums, archives, historical societies, or similar institutions OCLC Members in each of three worldwide regions organize into Regional Councils Each Regional Council elects delegates to the OCLC Global Council This body consists of 48 member delegates and it articulates the various interests of the OCLC Members to the OCLC Board of Trustees

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 7a		The OCLC Global Council elects six members of the OCLC Board of Trustees

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 7b		The OCLC Global 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 B, line 11		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 compensation and an analysis of compensation 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 compensation 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 More information about OCLC executive compensation can be found on the OCLC website at the following link www oclc org/us/en/about/trustees/compensation/executive_compensation htm

Identifier	Return Reference	Explanation
Form 990, Part VI, Section C, line 19		TThe 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/news/publications/financial/ A description of the conflict of interest policy is contained in OCLCs 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 The Annual Report is also available on the OCLC website

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
		Addendum for Schedule R, Part IV The following non-U S corporations are 100 % owned by OCLC Online Computer Library Center, Inc and are reported in Part IV of Schedule R because they are considered taxable organizations in their respective countries However, they are owned by a nonprofit organization exempt from U S taxes under Section 501(c)(3) All of these organizations engage in providing computerized services to libraries in their regions Those services provide the same functional support to libraries that OCLC provides to U S libraries The purpose and mission of these non-U S corporations is the same as OCLC While the countries where these corporations reside consider them subject to income tax under local law, those same activities performed by OCLC have been deemed exempt by the Internal Revenue Service As such, these non-U S corporations meet the operational test for U S exemption In addition, since the non-U S corporations are 100% owned by OCLC, all earnings and assets of those corporations are fully controlled by, and a benefit to, a U S nonprofit organization Based on this, OCLC considers these non-U S corporations to be de facto exempt organizations under U S law However, since these non-U S corporations have no permanent establishments or business operations in the U S , there is no U S reporting required and they are, therefore, not included with this information report OCLC EMEA BV The Netherlands OCLC BV The Netherlands OCLC GmbH Germany OCLC AG Switzerland OCLC (UK) Limited United Kingdom

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 More information about OCLC Board compensation can be found on the OCLC website at the following link www oclc org/us/en/about/trustees/compensation/compensation_q_and_a htm

SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2009

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 (Complete if the organization answered "Yes" on Form 990, Part IV, line 33.)

(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 (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.)

(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 (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

(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, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?	
							Yes	No		Yes	No

Part IV Identification of Related Organizations Taxable as a Corporation or Trust (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

(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		4,028,769	100 000 %
Dimema Inc 220 West Mercer St W-200 Seattle, WA98119 91-2129115	information Services	WA	OCLC INFORMATION DISTRIBUTION INC	C	100,142	113,722	100 000 %
OCLC EMEA BV SCHIPHOLWEG 99 2300 AW LEIDEN NL	HOLDING COMPANY	NL	OCLC Online Computer Library Center Inc	C	2,487,219	12,767,801	100 000 %
OCLC BV SCHIPHOLWEG 99 2300 AW LEIDEN NL	INformation Services	NL	OCLC EMEA BV	C	15,885,657	10,253,077	100 000 %
OCLC Gmbh GRUNWALDER WEG 28G 82041 OBERHACHING GM	INformation Services	GM	OCLC EMEA BV	C	11,372,112	3,007,615	100 000 %
OCLC AG ST JAKOB-STRASSE 96 CH-4052 BASEL SZ	Information Services	SZ	OCLC GMBH	C	726,054	231,803	100 000 %
OCLC (UK) LIMITED 861 ECCLESAL ROAD SHEFFIELD S11 7AE UK	INformation Services	UK	OCLC EMEA BV	C	12,245,989	6,741,964	100 000 %

Part V Transactions With Related Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35, or 36.)

		Yes	No
Note. Complete line 1 if any entity is listed in Parts II, III or IV			
1 During the tax year, did the orgranization 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	1a		No
b Gift, grant, or capital contribution to other organization(s)	1b		No
c Gift, grant, or capital contribution from other organization(s)	1c		No
d Loans or loan guarantees to or for other organization(s)	1d		No
e Loans or loan guarantees by other organization(s)	1e		No
f Sale of assets to other organization(s)	1f		No
g Purchase of assets from other organization(s)	1g		No
h Exchange of assets	1h		No
i Lease of facilities, equipment, or other assets to other organization(s)	1i		No
j Lease of facilities, equipment, or other assets from other organization(s)	1j		No
k Performance of services or membership or fundraising solicitations for other organization(s)	1k	Yes	
l Performance of services or membership or fundraising solicitations by other organization(s)	1l	Yes	
m Sharing of facilities, equipment, mailing lists, or other assets	1m	Yes	
n Sharing of paid employees	1n	Yes	
o Reimbursement paid to other organization for expenses	1o	Yes	
p Reimbursement paid by other organization for expenses	1p	Yes	
q Other transfer of cash or property to other organization(s)	1q		No
r Other transfer of cash or property from other organization(s)	1r		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	**(b)** Transaction type(a-r)	**(c)** Amount involved
(1) OCLC EMEA BV	K	253,784
(2) OCLC BV	L	1,206,139
(3) OCLC GMBH	L	1,468,642
(4) OCLC (UK) LIMITED	L	3,408,949
(5) oCLC (UK) LIMITED	N	94,500
(6)		

Part VI **Unrelated Organizations Taxable as a Partnership** (Complete if the organization answered "Yes" on Form 990, Part IV, line 37.)

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

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Are all partners section 501(c)(3) organizations?		(e) Share of end-of-year assets	(f) Disproprtionate allocations?		(g) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(h) General or managing partner?	
			Yes	No		Yes	No		Yes	No

Additional Data

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

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(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						62,250	0	0
Ed Barry Vice Chair	10 00	X						33,000	0	0
Mary M Farrell trustee	8 00	X						37,500	0	0
anthony Ferguson trustee	10 00	X						28,996	0	0
ralph Frasier trustee	5 00	X						25,840	0	0
bernadette Gray-Little trustee	5 00	X						0	0	0
kathleen Imhoff trustee	5 00	X						27,996	0	0
david Lauer trustee	8 00	X						35,000	0	0
james Neal trustee	5 00	X						0	0	0
bruce newell trustee	8 00	X						36,000	0	0
elisabeth Niggemann trustee	8 00	X						36,666	0	0
john R Patrick trustee	5 00	X						3,833	0	0
David Roselle Trustee	8 00	X						38,666	0	0
Jane N Ryland Trustee	5 00	X						29,996	0	0
robert A Seal trustee	5 00	X						30,330	0	0
lizabeth A Wilson trustee	8 00	X						33,530	0	0
sandra Yee trustee	5 00	X						32,996	0	0
Robert L Jordan President & CEO	55 00	X		X				4,082,612	0	48,166
Rick J Schwieterman Executive VP and CFO	55 00			X				426,486	0	49,370
James T Houfek VP & General Counsel	45 00			X				251,643	0	30,214
Karen Calhoun VP Worldcat/Metadata Ser	50 00			X				190,096	0	17,921
Bruce Crocco VP Libr Svcs for America	45 00			X				197,343	0	29,528
Lorcan Dempsey VP Research & Strategist	40 00			X				263,547	0	41,843
Catherine De Rosa VP Global Marketing	40 00			X				271,983	0	41,356
Jim Michalko VP RLG Programs	40 00			X				247,744	0	34,224

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(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			
Robin Murray VP, Global Product Mgmt	50 00			X				0	174,757	7,487
George Needham VP Global Councils	30 00			X				176,474	0	26,772
William Nilges VP Business Development	40 00			X				212,376	0	33,425
Tammi Spayde VP, Human Resources	45 00			X				207,214	0	33,307
Michael Teets VP Product Innovation	50 00			X				210,322	0	34,625
Andrew Wang VP, OCLC Asia Pacific	50 00			X				220,939	0	31,029
Greg Zick VP, Global Engineering	40 00			X				234,559	0	39,219
Gene Oliver Exec Dir Systems Mgmt	45 00				X			171,920	0	43,532
Tom Hickey Chief Scientist	40 00					X		197,702	0	33,072
Sondra Kowaluk Corporate Controller	45 00					X		185,822	0	33,221
Gary Perlman Lead User Researcher	40 00					X		187,519	0	12,405
Marty Withrow Director Cataloging Prod	40 00					X		165,851	0	25,333
STANLEY WOODEND 1009 exec Dir Webjunction	40 00					X		199,883	0	30,276
Tom Shaughnessy Former Trustee							X	17,319	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
MetaData Services	519,100	85,474,438	85,474,438		
Resource Share Svcs	519,100	44,258,798	44,258,798		
Reference Services	519,100	31,407,640	31,407,640		
E-Book & Audio Books	519,100	14,039,977	14,039,977		
Digital / Preservation	519,100	4,950,491	4,950,491		

Form 990, Part IX - Statement of Functional Expenses - 24a - 24e Other Expenses

Do not include amounts reported on line 6b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
IFM Lending Credits	15,393,892	15,393,892		
Marketing	9,340,491	9,340,491		
Program Incentives	7,677,051	7,677,051		
Cataloging Credits	5,003,894	5,003,894		
Other Than Temporary In	1,686,058	1,686,058		

Additional Data

Return to Form

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)	688,080	385,105	3,009,427	34,818	13,348	4,130,778	2,903,310
	(ii)	0	0	0	0	0	0	0
Rick J Schwieterman	(i)	271,272	101,331	53,883	32,010	17,360	475,856	0
	(ii)	0	0	0	0	0	0	0
James T Houfek	(i)	149,843	59,884	41,916	22,317	7,897	281,857	0
	(ii)	0	0	0	0	0	0	0
Karen Calhoun	(i)	123,803	41,694	24,599	15,680	2,241	208,017	0
	(ii)	0	0	0	0	0	0	0
Bruce Crocco	(i)	139,506	54,096	3,741	12,442	17,086	226,871	0
	(ii)	0	0	0	0	0	0	0
Lorcan Dempsey	(i)	159,310	54,796	49,441	23,962	17,881	305,390	0
	(ii)	0	0	0	0	0	0	0
Catherine De Rosa	(i)	188,265	68,369	15,349	24,560	16,796	313,339	0
	(ii)	0	0	0	0	0	0	0
Jim Michalko	(i)	188,269	34,124	25,351	25,607	8,617	281,968	0
	(ii)	0	0	0	0	0	0	0
Robin Murray	(i)	0	0	0	0	0	0	0
	(ii)	142,812	31,945	0	7,140	347	182,244	0
George Needham	(i)	98,054	50,165	28,255	12,189	14,583	203,246	0
	(ii)	0	0	0	0	0	0	0
William Nilges	(i)	141,314	54,053	17,009	17,832	15,593	245,801	0
	(ii)	0	0	0	0	0	0	0
Tammi Spayde	(i)	147,198	48,506	11,510	17,832	15,475	240,521	0
	(ii)	0	0	0	0	0	0	0
Michael Teets	(i)	155,606	53,251	1,465	17,832	16,793	244,947	0
	(ii)	0	0	0	0	0	0	0
Andrew Wang	(i)	140,694	52,726	27,519	18,580	12,449	251,968	0
	(ii)	0	0	0	0	0	0	0
Greg Zick	(i)	172,302	45,597	16,660	22,317	16,902	273,778	0
	(ii)	0	0	0	0	0	0	0
Gene Oliver	(i)	127,505	36,953	7,462	15,847	27,685	215,452	0
	(ii)	0	0	0	0	0	0	0
Tom Hickey	(i)	125,317	32,292	40,093	19,124	13,948	230,774	0
	(ii)	0	0	0	0	0	0	0
Sondra Kowaluk	(i)	109,808	35,952	40,062	16,935	16,286	219,043	0
	(ii)	0	0	0	0	0	0	0
Gary Perlman	(i)	166,147	19,695	1,677	9,138	3,267	199,924	0
	(ii)	0	0	0	0	0	0	0
Marty Withrow	(i)	129,661	32,004	4,186	12,407	12,926	191,184	0
	(ii)	0	0	0	0	0	0	0
STANLEY WOOD(END 1009)	(i)	111,023	15,801	73,059	9,594	20,682	230,159	0
	(ii)	0	0	0	0	0	0	0
Tom Shaughnessy	(i)	17,319	0	0	0	0	17,319	0
	(ii)	0	0	0	0	0	0	0

Additional Data

Return to Form

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Software Version:
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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, OH 43017 87-0374788	Information Services	OH	OCLC Online Computer Library Center Inc	C		4,028,769	100 000 %
Dimema Inc 220 West Mercer St W-200 Seattle, WA 98119 91-2129115	information Services	WA	OCLC INFORMATION DISTRIBUTION INC	C	100,142	113,722	100 000 %
OCLC EMEA BV SCHIPHOLWEG 99 2300 AW LEIDEN NL	HOLDING COMPANY	NL	OCLC Online Computer Library Center Inc	C	2,487,219	12,767,801	100 000 %
OCLC BV SCHIPHOLWEG 99 2300 AW LEIDEN NL	INformation Services	NL	OCLC EMEA BV	C	15,885,657	10,253,077	100 000 %
OCLC Gmbh GRUNWALDER WEG 28G 82041 OBERHACHING GM	INformation Services	GM	OCLC EMEA BV	C	11,372,112	3,007,615	100 000 %
OCLC AG ST JAKOB-STRASSE 96 CH-4052 BASEL SZ	Information Services	SZ	OCLC GMBH	C	726,054	231,803	100 000 %
OCLC (UK) LIMITED 861 ECCLESAL ROAD SHEFFIELD S11 7AE UK	INformation Services	UK	OCLC EMEA BV	C	12,245,989	6,741,964	100 000 %