

## Bosler, Jerry

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**From:** Michael C Piper [aj0386@wayne.edu]  
**Sent:** Thursday, September 26, 2002 5:47 PM  
**To:** Scott P. Muir; Leo A. Papa; Patricia L. Orr; Bosler, Jerry; Ann Walaskay  
**Cc:** John Shannon  
**Subject:** RE: DALNET Planning Team. Meeting 17. Follow-up

Dear colleagues,

Thank you for your time on Tuesday. Sorry for the delay in getting back to you -- this week has been nuts. Here's my understanding of our discussion and agreements:

1) Planning process overview. Becky Schreiber and John Shannon, our consultants, outlined the planning process, emphasizing the need for organizational commitment and for creating a communications approach for those who will not be part of actually writing the plan. Our discussion surfaced several issues that reinforce the need for the environmental scan during the retreat:

\* There is a lack of consensus about what DALNET needs to be focusing on. Members want DALNET to get the integrated library system piece right, but they also want us it to be more than just an ILS provider. What does DALNET's next phase look like? What kind of future do we want to create for DALNET? What direction should we go, and what are our values? These are key questions to be addressed during the retreat.

\* Member libraries are experiencing pressure to do more with less, and are striving to take their libraries to customers rather than waiting for them to come to the library.

\* Some members believe current generation ILS products can "run themselves," and perceive that they could get their own systems for less than they pay DALNET. (Yikes!) If DALNET is to survive, we must find new ways to help each member serve customers more effectively than they could do on their own. As we continually seek new ways to add value for members, we must also enhance our strategies for highlighting the benefits of DALNET membership.

2) Retreat participants. Becky and John emphasized the importance of including stakeholders at the retreat who will influence outcomes of the planning effort. Per our discussion, I've invited Louise Bugg to join the Planning Team. Louise is thinking this over. I also gave Sandy a heads up that I'll be inviting the Board to review the proposed participants list, and asking for suggestions about others who should be included. I've posted a note on the Board list.

3) Data gathering. I'll ask Board members to help us gather background information at their host institutions before the retreat. Then we'll include this in the environmental scan at the outset of the retreat, reflecting back what we are hearing from customers. Rather than asking Board members to collect this, I suggest that we post a form on our Web site. A draft memo is attached for your review and comment. Please send me your comments by noon on Monday, 30 September 2002.

4) Building implementation into the process. We can build in time before the retreat ends for groups to discuss implementation, with the expectation that we will recruit new members for the Planning Team at the retreat. Toward the end of the session, we'll ask people to consider "How do I fit into what we've discussed during the retreat? How can I help to implement this?" Afterward, the Planning Team will be responsible for developing a plan by 30 April 2003, including our vision for the next generation of the ILS.

5) Facility arrangements. Becky and John specified that we need a large open room with ample wall space for newsprint, and with windows. No need for breakout rooms. Restaurant on-site or close-by. Options include: Walsh Troy campus? UDM Outer Drive? Elaine is working on a proposal for us.

6) Alternate date, in case of weather problems? We decided to set an alternate date in January, if necessary. ALA will be on 24-29 January 2003, so the 27-28 January dates we discussed are out.

7) How do we use upcoming Board meetings to prepare for the retreat? We can go over the planning process at the 28 October Board meeting, and provide background on "white paper" issues selected by the Board.

8) Next steps. John and Becky will get back to us with a proposal, based on what they heard Tuesday. Our next conference call is set for 10 am EDT (8 am MDT) on Tuesday, 8 October 2002. agenda to be announced; your suggested agenda topics are invited.

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Proposed draft memo to DALNET Board

Please review and comment by noon on Monday, 30 September

Dear DALNET Board members,

I'm writing to ask you to help us set the stage for a successful planning retreat on 2-3 December 2002.

When we meet to begin defining and creating our desired future for DALNET, I want us to benefit from the wisdom of our members. So at the beginning of the retreat, we'll review what members are telling us in terms of how we are doing, what we can be doing better, and what direction DALNET should take in the future.

Before the retreat, we will be posting a brief survey on the DALNET Web site. This survey will ask members to complete the following three sentences:

1) I appreciate DALNET for:

2) I wish DALNET would:

3) One new service DALNET should consider is:

I hope you will complete the survey. I also hope you'll invite your staff members to complete it too. All responses will be anonymous, and will greatly enrich our planning process. Thank you for your consideration.