

DALNET: New Member Recruitment Process

STEP 1: INFORMATION GATHERING

DALNET staff meets with the potential member and using a standardized checklist, compiles preliminary information. Staff determines if site is interested in the shared ILS or not. During this initial phase, which may occur via multiple on-site meetings or phone conversations, staff outlines the added values of DALNET membership, provides background on DALNET, gathers information from the potential member, and outlines expectations for DALNET members.

Appendix A: Initial Member Profile

Appendix B: DALNET Added Values

Appendix C: DALNET Background and Administration

Appendix D: Expectations of DALNET members

STEP 2: ADVISE THE BOARD OF DIRECTORS

Staff advises the Board that they have entered a discussion with the new potential member. Board should advise staff of any immediate concerns.

STEP 3: PRICING PROPOSAL

The DALNET Treasurer prepares a pricing proposal for staff, based on information gathered in Step 1 and based on the current cost allocation formula.

STEP 4: COMPLETE MEMBERSHIP APPLICATION

The staff reports back to the prospective member about the estimated costs of DALNET membership. If the prospect wishes to apply for membership, staff holds additional meetings to help the potential member complete the membership application. Information to be gathered at this stage includes budget data and the project manager's experience with integrated library systems.

Appendix E: Membership application

STEP 5: STAFF PREPARES IMPACT STATEMENT

Following the preliminary visit(s), staff reviews the membership application, assesses the potential member's possible impact and completes a report outlining these findings for the Executive Committee, including technical qualifications and infrastructure impact.

STEP 6: EXECUTIVE COMMITTEE REVIEWS APPLICATION

The Executive Committee reviews the potential member's application, and requests additional information or clarification as appropriate. Based on this review, the Executive Committee makes a recommendation to the Board concerning this candidate's membership.

In reviewing membership applications, the Executive Committee should consider the new site's unique subject strengths and other reciprocal resource sharing benefits to be derived by DALNET's current members and by the new site. When devising its

recommendation, the Committee will consider factors such as the prospective member's:

- Ability to meet continuing membership obligations.
- Contribution, in terms of collection value, geographic or type of library diversity.
- Current relationship with one or more DALNET member institutions.
- Expertise that could contribute to DALNET's advancement.
- Political impact, such as whether or not the new member would expand DALNET's sphere of influence or enhance the consortium's grant-seeking ability.

STEP 7: BOARD ACTION

The Executive Committee submits its recommendation and the DALNET Board acts on the recommendation.

STEP 8: NOTIFICATION

Then the Director and/or the Board Chair informs the potential member of the Board's decision. If the Board approves the application, the Treasurer issues a contract, and staff offers to help with potential member's internal approval process, as appropriate.

STEP 9: PROSPECTIVE MEMBER APPROVAL PROCESS

The potential member completes the contract and joins DALNET.

STEP 10: IMPLEMENTATION

If the member joins DALNET, staff then prepares the new member implementation plan for any contracted services and assists the new site with executing the plan.

Note: A Flowchart of the application process appears in Appendix F.

Appendix A

INITIAL MEMBER PROFILE

- Size of collection
- Current automation
- Audience served
- Collection development
- Collection specialties
- Digital collections, current and potential
- Reciprocal arrangements in place
- Organizational structure (number of sites)
- Technical expertise of staff
- Financial/human resource responsibilities of potential member sites
- Identified costs, including explanation of pricing formula
- In-institution staff responsibilities: Director and Project Manager
- Information Technology requirements, such as network connections (no dial-up) and workstation requirements

Appendix B

DALNET ADDED VALUES

Hardware/Software Maintenance for ILS

- Regular updates of software. Server operations, upgrades.
- Reporting scripts for running ILS statistics developed and shared by members.
- Testing scripts for the ILS developed and shared by members.

Services

- Authentication Services, providing remote access of password-protected resources.
- OCLC monograph holdings updates in shared ILS.
- Record loading, for retrospective conversion projects or other bulk purchases of records (Shared ILS only)
- DALNET Staff - The work performed by this staff makes it possible for an institution to run an ILS without having to fund an additional IT staff member.
- Support for digitization projects.

Professional Development

- Training for the DALNET shared ILS and other software used by DALNET.
- Members are afforded the opportunity to stay informed about new developments.
- Project Manager's consultation – Instant contacts to “figure out” how to do something in Horizon by seeking the help of others who have already done it. This group is also available for discussion and consultation for any other work that a library may be doing.
- The work of the library professional is made easier through cooperative efforts.

Shared Information Resources

- Access and input to DALNET and DALNET member institution-made databases.
- Reciprocal borrowing agreements.
- MiLE and other cooperative ILL services

Other DALNET membership benefits

- Promotion in a known library consortium.
- An influential relationship with a major ILS vendor – ^{Sys}Dynix
- DALNET members have the opportunity to make decisions to be part of what is going on. The influence of a consortium has the potential to be much more than that of an individual institution.

Appendix C

DALNET BACKGROUND AND ADMINISTRATION

DALNET history

- Establishment – when, where, why
- Information regarding current members
- DALNET Web Site
- Relationship to WSU

Current DALNET organization

- Provide copy of Board membership
- Provide copy of organization chart
- Provide copy of Bylaws

DALNET services: Who we are and what we do

- Leadership and coordination of automation programs
- Access to staff expertise
- Training
- Collaboration with members
- MiLE and Reciprocal borrowing
- ILS: software, servers and functionality
- Digital projects

Appendix D

EXPECTATIONS OF DALNET MEMBERS

- DALNET is comprised of its host institution, Wayne State University, and those institutions that have been approved by the DALNET Board, and have signed a valid DALNET Online System Agreement with WSU. Membership is open to academic, public, school and special libraries as well as information organizations within DALNET's service area.
- DALNET members contribute to a shared online system. They also share a commitment to advancing resource sharing to better serve the people of southeast Michigan. Each member pays an appropriate share of the costs of managing and operating the shared online system, as determined by the DALNET Board. *designated*
- Participation in DALNET requires shared decision-making and collaboration in developing common policies. Membership in DALNET represents a privilege with the expectation of active and continuing participation by each member site. As a consideration for acceptance and continuation of institutional membership and participation in DALNET, member institutions agree to:
 - Share resources and provide interlibrary loan services to other members within DALNET standards and procedures, and according to institutional policies.
 - Deliver library services and a collection adequate for local needs, and contribute to the Horizon shared system and online public access catalog.
 - Maintain onsite equipment, telecommunications network and technical staff compatible with the DALNET infrastructure and standards.
 - Abide by the DALNET Bylaws and applicable DALNET database standards.
 - Appoint a project manager, who will administer the member's Horizon operation, participate in Project Managers' meetings, provide appropriate communications about DALNET issues within their host institution, and provide local management of other DALNET services. This includes loading the Horizon client and helping with Horizon table configuration. *ILS*
 - Participate in DALNET governance by sending a representative to Board meetings.
 - Contribute to the work of the consortium by delegating library staff to serve on DALNET committees and to participate in appropriate training and continuing education programs.
 - Support the Library Bill of Rights, Librarians Code of Ethics and ALA's Freedom to Read and Freedom to View statements, and their interpretations.
 - Support DALNET marketing within the institution's user community.
 - Evidence commitment to advance DALNET to higher levels of service beyond the ILS by supporting Beta or demonstration projects. *software*

Appendix E MEMBERSHIP APPLICATION*

NAME OF APPLICANT:

Address:

Type of Institution:

Project Manager (*Include technical qualifications, credentials, and experience with integrated library systems, resource sharing and library cooperation*):

(Please attach any documentation that describes mission, history or current programs.)

		Institution Answers
NUMBER OF LIBRARY LOCATIONS		
Administered centrally or by individual sites?		
STAFFING		
	Professional	
	Technical	
	Other	
AUDIENCE SERVED		
	Students	
	Faculty	
	Public	
	Professional	
	Other	
AVERAGE ANNUAL CIRCULATION <i>(Explain availability to general public)</i>		
AVERAGE NUMBER OF INTERLIBRARY LOANS <i>(Borrowing/Lending)</i>		

		Institution Answers
CURRENT LIBRARY OR INSTITUTION RECIPROCAL AGREEMENTS		
SIZE OF COLLECTION		
	Monographs	
	Serials (Including Electronic)	
	Media	
	Other	
	Average number of new titles to collection per year	
SPECIAL COLLECTIONS (Describe)		
DIGITAL COLLECTIONS		
	Current	
	Potential	
INFORMATION TECHNOLOGY		
Include: ISP & Speed of Internet Connection	Network Description	
Staff use only	No. of workstations	
Public staff use only	No. of workstations	
	Current staff Workstation Configurations	

		Institution Answers
	Current and planned computer replacement schedule	
AUTOMATION		
<i>If applicable</i>	Current Vendor	
<i>If applicable</i>	Control numbers currently maintained in your bibliographic records	Check all that apply <input type="checkbox"/> ISBN <input type="checkbox"/> OCLC <input type="checkbox"/> ISSN <input type="checkbox"/> Other _____
<i>If applicable</i>	Formats currently used for item and patron barcodes and ID numbers	
<i>If applicable</i>	Will you need to transfer data electronically?	Check all that apply <input type="checkbox"/> Send fines data to a billing office <input type="checkbox"/> Order data to suppliers <input type="checkbox"/> Serials claiming <input type="checkbox"/> Upload patron data from administrative database(s) <input type="checkbox"/> Other: _____
Please discuss why your institution wants to join DALNET. Please address any fiscal and/or technical issues that prompt your institution to look for a new ILS.		
Please tell us how your institution would add value to the DALNET community.		

Sections related to the ILS can be omitted if site does not plan to participate in the shared ILS

Appendix F FLOW CHART

