

## DALNET PLANNING PROCESS TEAM MEETING

February 2, 1996  
2:45 - 4:30 p.m.

### Agenda

1. Followup on Visioning Retreat (report due February 15th)
  - ▶ draft thank you's — *participants*
  - ▶ assignments to Planning Team
  - ▶ Other?
2. Develop Timetable for Next Steps?
  - ▶ strategic planning process?
  - ▶ criteria for next generation system?
3. Education Sessions for Project Managers
  - ▶ what's next?
  - ▶ need time to discuss/evaluate what we've learned so far?
4. Other

L. Bugg  
2/2/96

LB96-37

# DALNET RETREAT - TRANSCRIPTION OF FLIP CHARTS

[Numbers in parens to right of entry = no. on flip chart; NN = no number on chart.]

(NN)

## WE ASSUME . . .

- \* Dalnet membership
- \* Dalnet end users
- \* Dalnet costs/funding
- \* Library/Info technology trends

## WE ASSUME...

(1)

### DALNET MEMBERSHIP:

- \* Membership will expand, become more diverse, and have levels (might go beyond libraries)
- \* Some members, dissatisfied with service, may go elsewhere
- \* Membership will continue to be desirable

### CONCERNS:

- \* Links may be tenuous
- \* Is it [WSU] "vendor" like?
- \* Outsourcing
- \* Cause we work together since we are different

## WE ASSUME. . .

(2)

### DALNET END USERS

- \* They will be more tech savvy - the more we give, the more they want,
- \* End users may demand both electronic and traditional sources
- \* They will be diverse in their level of tech expertise - we need to meet needs of both ends of spectrum (gap will grow)
- \* Users want access to full text at desk top - use multiple sources - not just home
- \* More remote users - and even beyond metro Detroit
- \* Users will bypass libraries
- \* Users want unmediated access (but some will need a lot of help or turnkey info)
- \* (Role of multimedia will grow)

**WE ASSUME. . .**

(3)

**DALNET COST/FUNDING**

- \* Tech shift (client/server) will drive up staffing costs in tech areas
- \* Costs to participate in Dalnet will go up and we might need entrepreneurial activities to shift costs away from members
- \* As costs rise, funding becomes more restrictive
- \* Users may have to pay for information
- \* Tech costs will rise faster than our revenues - more of Dalnet members budgets will go to tech
- \* Cooperative resource sharing might free up funding for other endeavors

**WE ASSUME. . .**

(4)

**LIBRARY AND INFO TECHNOLOGY TRENDS**

- \* Training for Librarians/Staff will be different and we'll need more
- \* Speed of change will accelerate; escalating spread of internet, WWW, and electronic, digitized info will drive info technology (but not stable)
- \* Different formats of info
- \* Libraries will become producers of info (repackaging, massage)
- \* More direct service from commercial info providers to users in competition with library
- \* ? Client/Server technology will make local systems more cost effective for individual members
- \* Distance education and other changes will force changes in info delivery
- \* Info tech costs will consume more of our budgets

(5)

**In working together as Dalnet members, we believe these core principles should guide our collective efforts. . .**

- \* We will work together in a spirit of trust and respect & embrace our differences. . .
- \* Cost sharing should be equitable based on fair principles
- \* Each library will be cooperative and mutually responsive and proactive
- \* Every member a leader
- \* Members will compromise for greater good

## CORE PRINCIPLES

(5A)

- \* ? We will treat each other as equals in decision making
- \* ? Members retain flexibility to move forward at their own rate of speed
- \* Maintain our strength based on common goals and needs

## PRINCIPLES FOR DEALING WITH CONFLICT

(5B)

- \* Make sure relevant info is gathered, evaluated, distributed
- \* Keep a sense of humor. . .
- \* Respect for diverse views and missions
- \* Stand behind decisions once made. . .
- \* Decisions based on facts, not emotions. . .
- \* Non-Judgmental
- \* Maintain open communication and provide options w/Dalnet context. . .
- \* Strive for flexibility so some can opt out w/o adversely affecting others
- \* Reference our common goal and mission

## WHY DALNET

(6)

Dalnet will be most likely to remain viable and grow in next 5 years if it provides these key benefits to:

- \* users
- \* members

## DALNET USERS - BENEFITS

(6A)

- \* Increased access to info, including document delivery (electronic full text and physical delivery)
- \* Remote access
- \* User friendly/easy/fast; educate/empower users
- \* Keep 2 way communications alive
- \* Shared online catalog
- \* More open door to members resources
- \* Create access to useful local data. . .
- \* Filtering/Distilling "Quality"

**MEMBER - BENEFITS**

(6B)

- \* Cost effective and timely services
- \* Flexibility for individual members = "CAFETERIA" Plan
  - \* Dalnet should facilitate members ability to keep up with technology.
- \$\$ \* Have a staff of experts and share their technical knowledge
- \* Provide way to share Dalnet member expertise
- \* Dalnet members can lend their shared info expertise to the entire area (proactive community wide resource for Detroit area renewal (renaissance))

(6C)

- [\* More functionality to automate operations than libraries can accomplish alone]
- \* Enhanced database access (consistent and standard info result in quality)
- \* More opportunities for staff development
- \* Gateways to other resources

**DALNET IS LIKELY TO FACE COMPETITION FROM . . .**

(7)

- \* Stand alone systems
- \* Internet
- \* Other consortia
- \* Commercial vendors
- \* Partial competitors in several areas, e.g. MLC, OCLC (for portions only)
- \* Possible future state initiatives

**Any vision statement for Dalnet should include these 3 words. . .**

(8)

- \*\*\*\*\* Sharing
- \*\*\*\*\* Cooperating
  - \*\* Mutually Supporting
    - Information
    - Dynamic
- \*\*\* Quality
  - Innovative
- \*\*\* Metro Detroit
  - Entrepreneurial
  - Responsive
  - Partnership
  - Access

- \*\*\* Service
- \*\* Excellence
  - Functional
- \*\* Multi-type
  - International
  - Links
  - Library
  - Leadership
  - Model
  - Forefront technology

**OUR VISION OF DALNET INCLUDES THESE COMPONENTS. . .**

(BY THE YEAR 2000, DALNET WILL. . .)

**[DRAFT VISION STATEMENTS FROM 4 TEAMS]**

**Team 1: 6 Votes**

A cooperative model information delivery system meeting and anticipating the needs of a diverse population effectively through sharing resources.

**Team 2: 5 Votes**

1. Dalnet will be the recognized model of excellence for multi-type library consortia.
2. Collectively, Dalnet will meet the very diverse information needs of the metropolitan area.
3. Dalnet will meet these needs through a variety of traditional and entrepreneurial services and activities.

**Team 3: 16 Votes**

Dalnet will be a pre-eminent consortium of multi-type institutions which will share resources in order to provide (its) info seekers, in a cost-effective and efficient manner, a variety of information services, using excellent advanced info technology systems.

**Team 4: 22 Votes**

**DALNET WILL. . .**

- 1) Be a model shared information delivery system to support the total information needs of users in the Metro Detroit area and beyond.
- 2) Provide excellent, cost-effective services to multi-type members through cooperation and resource sharing.
- 3) Be an information provider of unique resources of the members and their communities

**LW Rewrite of Team 4 Draft Vision Statement]**

(9)

**DALNET WILL. . .**

- 1) Be a model shared information delivery [system] to anticipate and support the total information needs of diverse users in the Metro Detroit area and beyond.
- 2) Provide excellent, cost effective services to multi-type members through traditional and entrepreneurial means of cooperating and resource sharing.
- 3) Be an information provider of unique resources of the members and their communities  
our vision of Dalnet includes these components . . .

**WHATS MISSING - WHAT NEEDS TO BE ADDED**

(9A)

- \* Pace of change
  - Word "Dynamic"
  - ability to rise to challenge
- \* {Leading or eminent  
[Pre-eminent] probably too strong  
{Recognized - Superb  
{Innovative
- \* "Consortium"
- \* Users=Add "Diverse"
- \* Fairness and equity {craft [in our] values statement}

**WHAT SHOULD HAPPEN NEXT TO THE DRAFT VISION. . .**

(9B)

- \* Lou edits draft. . . by February 15
- \* Goes to Board (with input from project managers) " 2 week window for input"
- \* Louise to coordinate the review and deliver to Board (through planning team)
- \* Closure in mid March
- \* Lou will provide other visions

(10)

**A NEW AUTOMATED SYSTEM SELECTION PROCESS FOR DALNET WILL BE MOST LIKELY TO SUCCEED IF. . .**

- \* Criteria slanted to end users
- \* Non techie/non library people involved in review process from early on
- \* Public/Tech services and technical staff library staff involved in review
- \* Agreement of Board, after decision made, to present united front
- \* Should include cost/benefit analysis
- \* Be open to all options, including ownership

(10A)1

- \* Should include vendor present. Site visits
- \* Consider existing resources and investments in the selection process
- \* Consider ease of migration. . .
- \* Want clear understanding of reasons to migrate to a new system

**NO FINAL DECISION ABOUT THE SYSTEM SHOULD BE (UNTIL) OR (UNLESS). . .**

(10A)2

[Rest of chart blank - not discussed during retreat]

**NEXT STEPS IN PLANNING PROCESS. . .**

(11)

Margaret Auer: Document of core principles

Louise Bugg: Extend timetable  
Planning Committee: "Educate about systems"

Lou: Suggest additional system guidelines

P. Brevik: Explore Ameritech options

Directors: Invite members of Dalnet to affirm interest in participating in selection process.



**LAYERS**

(NN)

Business Plan:      Action Plan  
                                 Objectives  
                                 Strategies  
                                 Mission/Goals  
                                 Vision  
                                 Values/Principles

**PARKING LOT FOR INTERESTING IDEAS . . .**

(NN)

Concern = Centralized - or federated or distributed model  
                                 or distributed similar model  
                                 or distributed dissimilar model

- \* Options/Levels for members
- \* Hope to be able to continue to use existing hardware

**A NEW VISION FOR DALNET IS MOST LIKELY TO BE ACCEPTED BY MEMBERS AND IMPLEMENTED IF IT HAS THESE CHARACTERISTICS . . .**

[Rest of chart blank - not discussed during retreat]