

DALNET PARTNERSHIP TEAM REPORT AND RECOMMENDATIONS
ALA Annual Conference Vendor Meetings

July 23, 1996

John Houser, DPL, Mary Ann Sheble, UDM (representing Margaret Auer), and Louise Bugg met at ALA in New York City with representatives from Ameritech Library Services to plan our Partnership Team Retreat this summer. We also met with representatives from CARL Corporation and DRA, at the request of the Board, to explore opportunities for partnering with them.

Mary Ann took extensive notes at these meetings, which were distributed to the rest of the team members when she got back from New York. The DALNET Partnership Team members then met on July 17th and 23rd to discuss what we had learned at ALA and to outline our report and recommendations for the Board.

SUMMARY OF ALA MEETINGS

1. DRA on July 6

Six DRA representatives, led by Barbara Baumgartner, met with us for 2 hours. We discussed the components of DALNET's vision for the next generation system and our desire to explore working in partnership with a vendor to develop the system we need. We also discussed DALNET's migration needs from our mainframe system with proprietary IBM networking.

The DRA group then made a presentation on their new client/server system and its development. They emphasized that many of the features of their system, either currently available or now in development, addressed the needs of the DALNET libraries. DRA is currently committed to a number of development projects through which they will be delivering some of the features and functionality they described. They are not in a position to take on additional development partners at this time, though they are interested in learning more details about our needs for future consideration. They would, of course, be interested in selling us their new system.

2. CARL on July 8

Three CARL representatives, led by Patricia Caulkin, met with us for 2 hours. We exchanged information much as we did at the DRA meeting. The direction at CARL has been to develop a series of separate enhancements and modules for their system, rather than to build a new "all-in-one" system. Some of their modules, such as the Kids Catalog, can be used with other vendors' systems, e.g., Dynix. CARL has a legacy system with thousands of lines of programming code to initially convert and later re-design and re-write as they become UNIX-based and system independent from their current Tandem platform.

The CARL group considers the company in a "partnership" with all its clients. They are interested in coming to Detroit to show us their system in more detail. They deliver system enhancements through contractual agreements with clients.

3. Ameritech on July 7

Ameritech representatives, led by Tom Burns, included Kevin Ash, Bill Easton, and Mari Hoashi-Franklin. Together, we discussed the elements of a report on the feasibility of a partnership between DALNET and Ameritech. Ameritech envisions a model metropolitan multi-type library information system.

We came up with these plans for a two-day retreat to explore the partnership by addressing the three components identified by Tom--our shared vision, impact, and trust.

DATE: August 28-29, 1996

PLACE: Detroit Metropolitan Area

WHO: DALNET Partnership Team representatives
Ameritech team, including Kevin Ash, Tom Burns, Stacey Cheatham,
Bill Easton, Mari Hoashi-Franklin.
Plus--someone to be the recorder (e.g., Mary Ann Sheble); someone to
facilitate (e.g., from Ameritech); an Ameritech representative
from their telecommunications or other customer services area.

TENTATIVE AGENDA:

Develop a shared vision for DALNET 3 to 5 years in the future

Identify possible short and long term joint projects to achieve that vision

Identify the importance/impact of those projects

Identify additional benefits beyond the integrated library system that
Ameritech can bring to a partnership arrangement

Outline a partnership proposal within the framework of multiple projects.

HOMEWORK FOR THE RETREAT:

DALNET Team: develop a document that describes DALNET's vision for
the next generation system by the week of August 5th, and make the local
site arrangements for the Retreat.

Ameritech Team: draft the agenda for the Retreat by the week of August 5th, and identify a facilitator and a telecommunications representative.

RECOMMENDATIONS

- I. The DALNET Partnership Team should proceed with the 2-day retreat with the Ameritech team members, as outlined above. A retreat site needs to be identified from among DALNET institutions. From DALNET's vision statement, the Team should develop a conceptual outline for the next generation system to be discussed at the DALNET Strategic Planning Retreat on July 25th. The feasibility report requested by the DALNET Board to help make the decision on the acceptability of the partnership will now be targeted for delivery in early October. This will be followed by an oral presentation to the Board of the pros and cons. This assignment should be the Team's number one priority.
- II. The DALNET Partnership Team, with input from knowledgeable DALNET staff, should further educate themselves about the current client/server marketplace by conducting a literature review and structured demonstrations of 3 to 5 leading client/server library information systems. The DALNET Partnership Team will arrange these demos and develop the list of components and key features to be examined to help determine the value of a partnership as compared with the outright purchase of a system. The demos will be done by the end of September.
- III. The DALNET Partnership Team should draft criteria for the consideration of the Board in making an informed business decision on the partnership proposal by the October Board meeting. The criteria should identify the benefits to DALNET that would make a partnership advantageous, for example:
 - A. Identify whether there are critical system features we must have and could not get without a partnership;
 - B. Identify the timeframe for delivery via partnership, purchase, or a combination;
 - C. Identify areas besides the shared system where we must have substantial benefits, e.g., telecommunications infrastructure and migration support;
 - D. Estimate the costs as compared to purchasing a system;
 - E. Identify other benefits to partnering, such as development of in-house staff expertise during the development projects;
 - F. Evidence of ability of the vendor to deliver on the partnership.

Submitted by,
Margaret Auer, Louise Bugg, Ana Fidler, John Houser, Michele Klein, Mary Ann Sheble
(Margaret's backup at ALA), and Frank White