

OLE, FOLIO & the Open Library Foundation

FOLIO Days – Stuttgart – 2017-10-17

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OLE Vision

The goal of the Open Library Environment Project (OLE Project) is to design a next-generation library system that breaks away from print-based workflows, reflects the changing nature of scholarly communications and new approaches to scholarly work, integrates well with other enterprise systems and can be easily modified to suit the needs of different institutions.

[Open Library Environment Project Final Report, p1](#)

- Modular – implement what you want
- Extensible – build new functionality
- Reusable Middleware – support management tools utilizing common & shared services
- Metadata format agnostic – not bound to a single metadata
- Shared vision, risk, & capacity
- Library in Context – embedded in our institutions

Kuali OLE – 2010-2015

- Partnership formed
 - 7 initial partners
 - Matching funds from the Andrew W Mellon Foundation
- Joined the Kuali Foundation
 - Collaborative & technical infrastructure
 - Administrative services
 - Funding model
- Designed and built ILS software
 - Hired external software development firm
 - Based on Kuali middleware and finance software

Kuali OLE – the Good & the Bad

- Successful collaboration
 - Governance gives voice to Partners
 - Innovated organizational structures
- Successive rounds of Mellon Foundation funding
- Partnership growth
- Spawned GOKb
- Production implementations
- The vision hasn't changed
- Software does not live up to vision
- Kuali Foundation rejects open source approach
- Kuali software dependencies restrict OLE progress
- Partners determine remediation requires significant work
- Future Partnership growth is limited by business model

“The Pivot” – Lessons Learned & Return to Vision

- Tension between practicality and vision
- Mind the dependencies
- Engage, and develop expertise, in all parts of the project
- Closed business model limits participation
- Improve library familiarity in project
 - Domain experience of developers
 - Foundation committed to library ecosystem
- Improve technical infrastructure
 - Modern & web-centric
 - Life cycle view of dependencies

OLE & FOLIO

- EBSCO approaches OLE with proposal to build *new* software rooted in the OLE vision
- Continuity of vision and goals, with OLE, makes FOLIO attractive to OLE Partners
- OLE commits to FOLIO with intention to adopt – first class member of the community
- OLE determines to not develop the OLE codebase further
- FOLIO is not the same architectural approach

OLE & FOLIO

- OLE seeks to bring library & librarian voices to FOLIO
 - Recruit participation
 - Aggregate resources – staff & cash – from libraries
 - Organize subject matter experts in SIGs to work with requirements process
 - Place key staff into project including developers, designers, and product owners
 - Participate & sustain community outreach, such as the FOLIOForum, to build a larger library community
 - Share vision, risk and capacity

OLE Staff Commitments

- Subject Matter Experts (SMEs)
 - 30+ individuals, ~ 6 FTEs
- Product Owners
 - 2 individuals, 1 FTE (Cornell, Fenway Libraries Organization)
- UX/UI Designers
 - 2 individuals, 1 FTE (OLE Core Team)
- Developers
 - 8 individuals, 5.5 FTE (Cornell, GBV/hbz, TAMU, Auburn, CU, OLE Core Team)
- Infrastructure team
 - 3 individuals, 0.6 FTE (Cornell, TAMU)
- Marketing & Communications team
 - 5 individuals, ~0.5 FTE (Colorado, Cornell, Duke, Lehigh, TAMU)
- Steering Committee
 - 6 individuals, ~0.5 FTE (Duke, GBV, Chicago, TAMU, Lehigh, Cornell)
- Total Contribution
 - 56 individuals, over 15 FTE, ~\$2M/year

OLE & FOLIO

- FOLIO is a unique collaboration among commercial & non-commercial partners
 - Improves sustainability by harnessing market forces
 - Improves opportunities for collaborations and innovations
 - Builds inter-partner relationships
 - A critical component of the FOLIO model is to engage and open the discussions
 - Introduces challenges & opportunities
 - Funding
 - Strategic direction
 - Openness across the ecosystem
 - Cultural – how we work & how we assess returns on investment

Open Library Foundation

*The Open Library Foundation is formed as a not-for-profit organization to **ensure availability, accessibility & sustainability** of open source & open access projects for and by libraries. The Foundation seeks to **enable and support collaboration** among librarians, technologists, designers, service providers and vendors to share expertise and resources and to create innovative new software and resources that support libraries. We believe that **open discourse in a diverse and inclusive community** will better identify and characterize challenges and opportunities, and enable paradigm-shifting solutions.*

[Foundation website](#)

- Formed by EBSCO & OLE in 2016 & began operations January 2017
- Established international & distinguished Board of directors
- Provides a set of services for collaborative communities working on open solutions for libraries
- Lightweight governance model

Open Library Foundation

- Foundation projects
 - FOLIO – EBSCO, Index Data, OLE
 - GOKb – German collaboration (ZDB, VZG, hbz), NCSU, CalTech, Knowledge Integration
 - OLE – OLE Partners
 - VuFind – Villanova University & worldwide community
 - Others to soon come
- Services
 - Collaboration tools
 - Administrative, Financial, & Legal
 - Marketing & Conference
 - Cross project fertilization

Questions