

The FOLIO Community

Michael Winkler – OLE Managing Director

FOLIO Vision

*FOLIO is a community collaboration of librarians, developers, designers, service providers, and vendors **working as partners** to analyze, design, develop and deliver **technology solutions** to improve library services. The premier effort of FOLIO is an **open source Library Services Platform (LSP) designed for innovation & sustainability**. FOLIO is meant to create a space, **a conversation**, for libraries and vendors to articulate challenges and opportunities, and to design and deliver services and solutions.*

FOLIO is Structured as

- An open community
- Open source software
- A Platform – modular & extensible – built to change & evolve
- An innovation engine – to support experimentation, extension, change, & collaboration – for library activity

FOLIO Community Benefits

Community Benefits

- FOLIO is a unique collaboration among commercial & non-commercial partners
 - Improves sustainability by harnessing market forces
 - Improves relevancy by embedding libraries in strategy, design & development
- Improves opportunities for collaborations & innovations – among partners and with other organizations
- A critical component of the FOLIO model is to engage & open the discussions

Participation in FOLIO

- Reduces the cost of innovation
- Lowers risk through collaboration
- Supports a new conversation in the library industry
- Ensures sustainability of effort through shared ownership

FOLIO Community Growth

- Global & diverse
- Non-commercial & commercial partners
- 7 commercial partners & 15 libraries & library networks
- 100+ librarians & 40+ developers
- 12 SIGs
- 20+ virtual working meetings per week



The Power of FOLIO is in the Community

- The community of people intentionally organized to identify, describe, experiment, and take collective action
- Collaborative work between libraries & vendors better sustains our efforts
- Collaborative work between libraries & vendors produces better understanding of current product needs, and of future directions
- Improve communications between libraries, networks, & the supply chain
- Gives voice to libraries as co-owners and partners in solutions
- Challenge to work across cultures

How to Join FOLIO

- We work in teams
- Teams consist of developers, designers, and product owners, and work with the support of a SIGs
- We have a roadmap of priorities & skills requirements
- Teams work with the SIGs or sub-SIGs on some piece of scope from the roadmap
- Teams are composed of available resources

OLE Community

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 libraries**, 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](#)



OLE Community Characteristics

- Membership community
- Dedicated to open solutions
- Shared risk
- Public service to the library community
- Partners contribute & aggregate resources, cash & staff, to populate OLE investments
- Engage with open source as a means of self determination, innovation, and strategic sustainability

OLE Community Investment in FOLIO

OLE Strategy in FOLIO

- Committed to building, implementing, & sustaining FOLIO for our Partners
- OLE, as a founding FOLIO Stakeholder, is driving shared & open governance
- OLE seeks to ensure equal voice for libraries through our strategic, substantial, & long-term engagement

OLE Participation in FOLIO

- Operations
 - 14 Developers
 - 3 Product Owners
 - 1 Designer
 - 60+ Subject Matter Experts
- Leadership
 - FOLIO Stakeholders Group
 - FOLIO Strategy Group
 - FOLIO Product Council (PC)
 - FOLIO PC Executive Group

Open Library Foundation

OLF Vision

*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](#)

OLF Characteristics

- Formed by EBSCO & OLE in 2016 & began operations January 2017
- Not-for-profit designation – 501(c)(3) charity
- A legal entity
 - Can sign contracts, make agreements, hire staff
 - Hold and manage funds
 - And can own intellectual property
- Provides a set of services for collaborative communities working on open solutions for libraries
- A host organization that enables & empowers communities in service to libraries

Open Library Foundation

Foundation Communities

- FOLIO – EBSCO, Index Data, OLE
- GOKb – German collaboration (ZDB, GBV/VZG, hbz), NCSU, CalTech, Knowledge Integration
- OLE – OLE Partners
- VuFind – Villanova University & worldwide community (in development)
- Others to soon come

Foundation Services

- Collaboration tools
- Administrative, Financial, & Legal
- Marketing & Conference
- Cross project fertilization
- Advocacy for responsibility, collective action, openness, innovation & equity in the ecosystem

Questions

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FOLIO Community is Open

- Open & inclusive definition of “community”
- Open participation – as designer, developer, service provider, vendor and user
- Open conversation – a place to discuss common issues, & determine to take action

