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
• 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.

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

*Open Library Environment Project Final Report, p1*
OLE Community Investment in FOLIO

OGLE 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

OGLE 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
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.

**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