



Open to Change: Extending Community Development Models to the Academic Library

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Kuali OLE Mission

- *The mission of Kuali OLE is to develop a sustainable Kuali system that provides academic library management services for higher education. It will use the legal umbrella of the Kuali Foundation, adhere to the Kuali licensing guidelines, and use the Kuali middleware, infrastructure, tools and processes.*
 - <http://www.kuali.org/ole>

Kuali OLE Partnership



INDIANA UNIVERSITY



Duke
UNIVERSITY



LEHIGH
UNIVERSITY



THE UNIVERSITY OF
CHICAGO

UF | UNIVERSITY of
FLORIDA



www.kuali.org



Penn
UNIVERSITY of PENNSYLVANIA

The Andrew W. Mellon Foundation



ole: next-generation open library systems



What is Kuali OLE?

- OLE Project lead by Duke with 15 partner Universities, Consortiums & National Libraries
- Community engagement & participation – over 300 participants from more than 100 institutions
- Described a service registry of library business process
 - <http://oleproject.org/final-report-on-ole-project/>
- Found sufficient need & ability to go forward with a build project for a community-sourced library system
- JISC Report – ILS Systems and the Shared Services Survey
 - <http://www.jisc.ac.uk/publications/briefingpapers/2008/librarymanagementbp.aspx>

Moving Towards Build

- **Kuali Foundation Charter**
 - Provide legal status, governance, resources & sustainability model
 - Critical technologies – Kuali Rice & Kuali Finance
 - Alignment of library business process with Kuali administrative suite
- **Project Scope, Funding & Partnership**
 - Developed project plan for a 2 year build project developed that outlined the scope, organization & goals over Fall 2009
 - Mellon awarded grant for \$2.38M in December
 - Partnership formed to execute the plan with \$2.5M in cash contributions in November

Kuali Foundation

- The Kuali Foundation is a non-profit, 501(c)(3) corporation that coordinates the development of free/open source administrative software under the Educational Community License.
 - Kuali Communities
 - Kuali Financial System (KFS)
 - Kuali Coeus (KC)
 - Kuali Rice (KR) – Academic Enterprise Service Bus
 - Kuali Student (KS)
 - Kuali OLE (KOLE)
 - Kuali Ready - SaaS

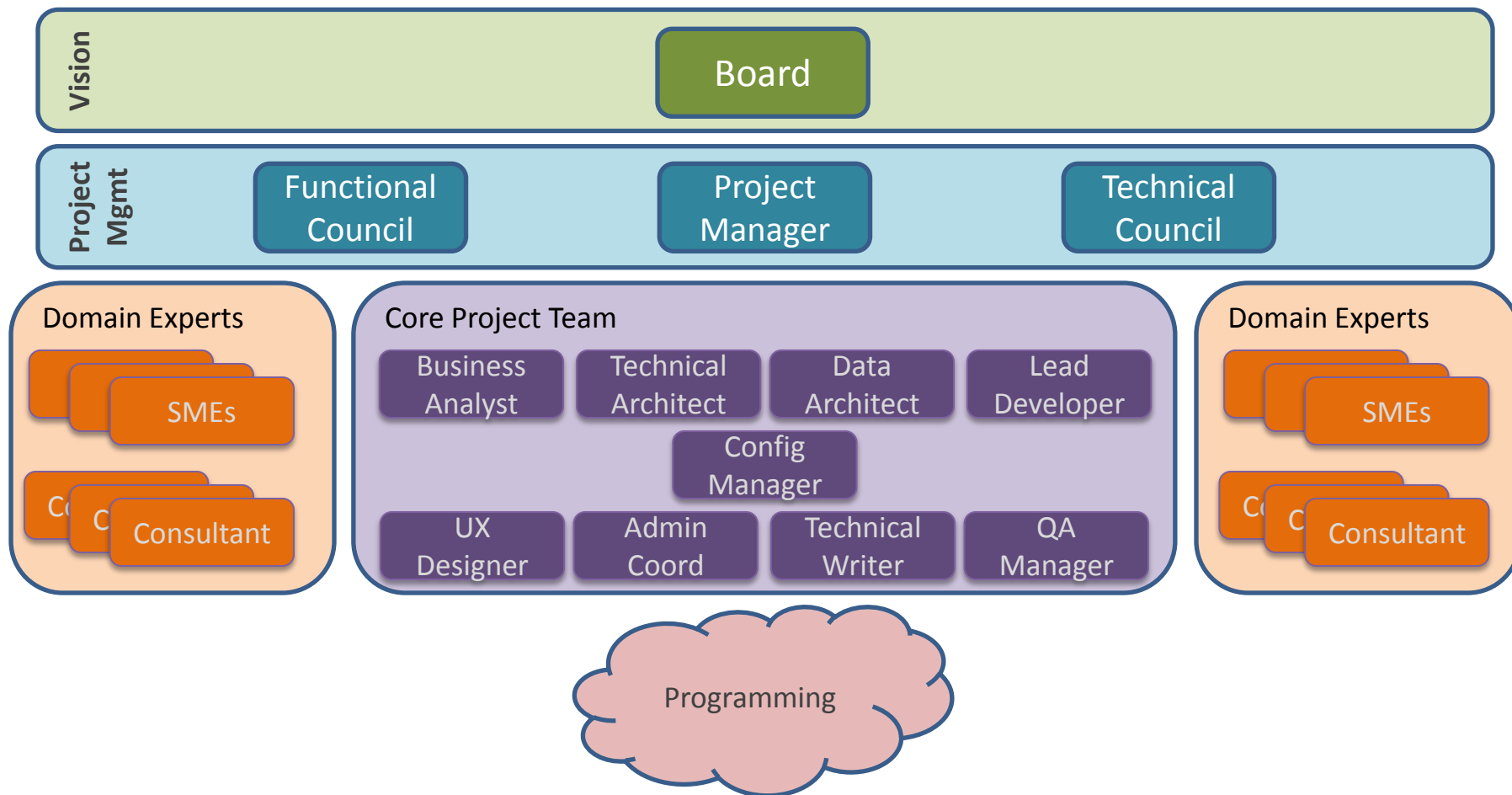
Kuali OLE Governance

- Collaboration between libraries & IT that raises library management system to enterprise level
- Co-Board Chairs to represent this collaboration:
 - Deborah Jakubs – University Librarian and Vice Provost for Library Affairs – Duke University
 - Brad Wheeler – Vice President for Information Technology & CIO – Indiana University
- Functional Council
- Technical Council
- Core Project Team at Indiana University

Kuali OLE Functional Council

- Mike Winkler – University of Pennsylvania, Chair
- Jim Mouw – University of Chicago
- Molly Tamarkin – Duke University
- Rachel Schipper – University of Florida
- Michael Charbonneau – Indiana University
- Tim McGeary – Lehigh University
- Carlen Ruschoff – University of Maryland
- Kristin Antelman – North Carolina State University
- Beth Camden – University of Pennsylvania

Kuali OLE Governance



Kuali OLE Collaborations

collectionspace

description, management & dissemination of museum collection information

ArchivesSpace

Integrations project between arcon and archivists toolkit that is considering implications of a services oriented architecture and enterprise service bus for their jointly developed archival system.



an international initiative that provides information to institutions on investing in and using information technology infrastructure. It advocates service-oriented approaches to facilitate technical interoperability of core infrastructure as well as effective use of available funding.

Kuali OLE Development Timeline

- Design project – Sept 2008 – July 2009
- Develop build partnership – Fall 2009/Spring 2010
 - Kuali Charter
 - Proposal for Mellon funding
 - Commitment by partners
- Build – July 2010 – July 2012
 - phase 1 – hiring, governance & design review
 - phase 2 – infrastructure & data flows
 - phase 3 – integration & testing
 - phase 4 – implementation & extension

Kuali OLE Build Partnership

- Strategic similarities to other Kuali Projects
 - Inadequate vendor options within current landscape
 - Required use of administrative data
 - Key community driven to invest in Kuali OLE
- Key Differences from other Kuali Projects
 - Large cash investment from all partners – more resources in cash than contributed FTE
 - Partners working to build capacity for java development during initial two year build project

Consortia and Partnerships

- IU System Libraries
 - State funded single ILS for 9 campus locations
- Triangle Research Library Network (TRLN)
 - Strategic partnership of research libraries
- Florida Collaboration
 - New partnership of public and private university libraries
- Like Apache Software Foundation
 - this is how we could grow
 - how to make this work for other consortial partners

IU System Libraries

- Bloomington
- Indianapolis
 - Columbus
- East
- Fort Wayne
- Kokomo
- Northwest
- Southbend
- Southwest



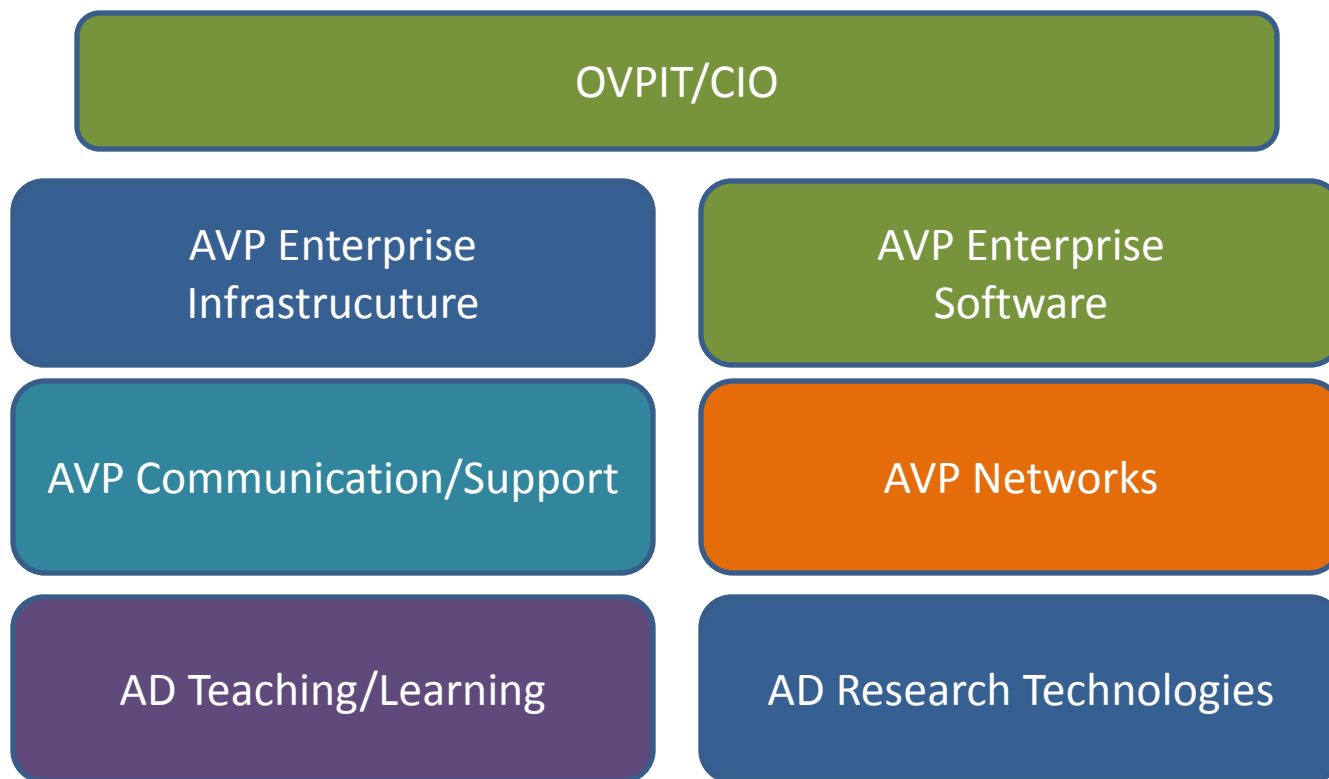
TRLN Collaboration

- Duke University
- North Carolina Central University
- North Carolina State University
- University of North Carolina – Chapel Hill

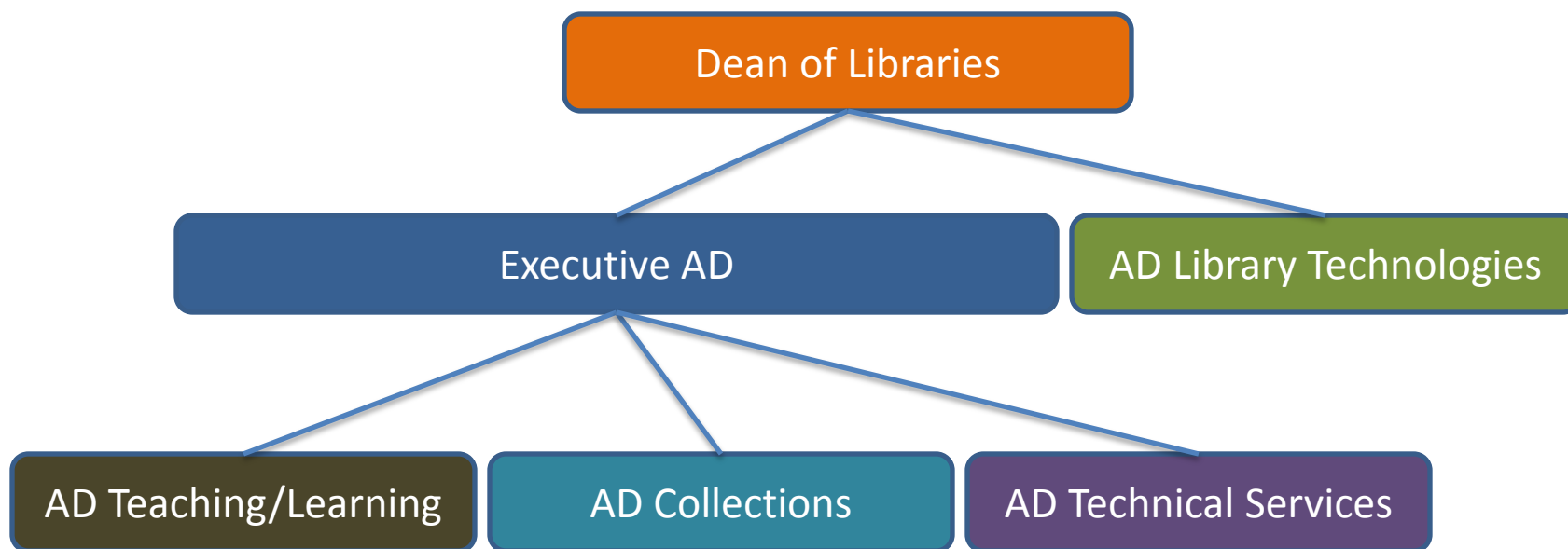
Florida Consortium

- **University of Florida (Lead School for Florida Consortium)**
 - New College of Florida
 - University of South Florida
 - University of Central Florida
 - Florida International University
 - Florida Center for Library Automation
 - Rollins College
 - University of Miami

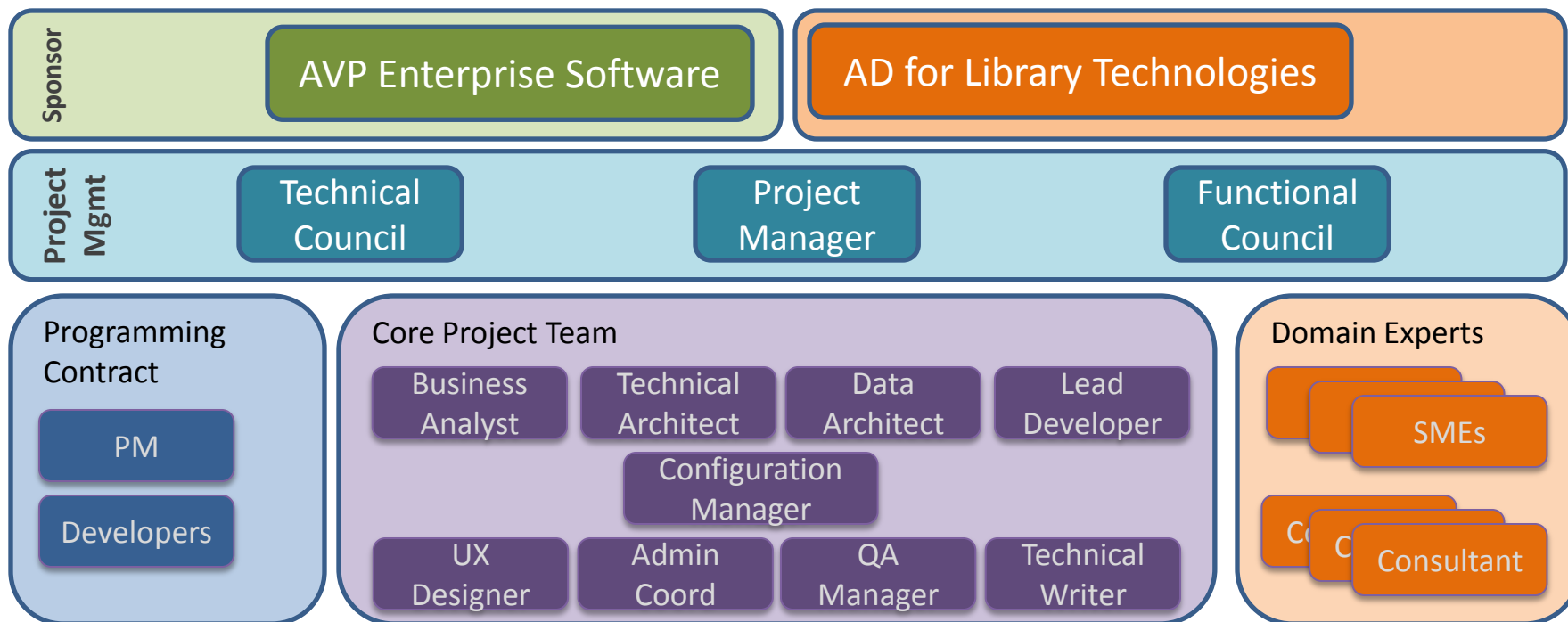
IU UITS Functional Areas

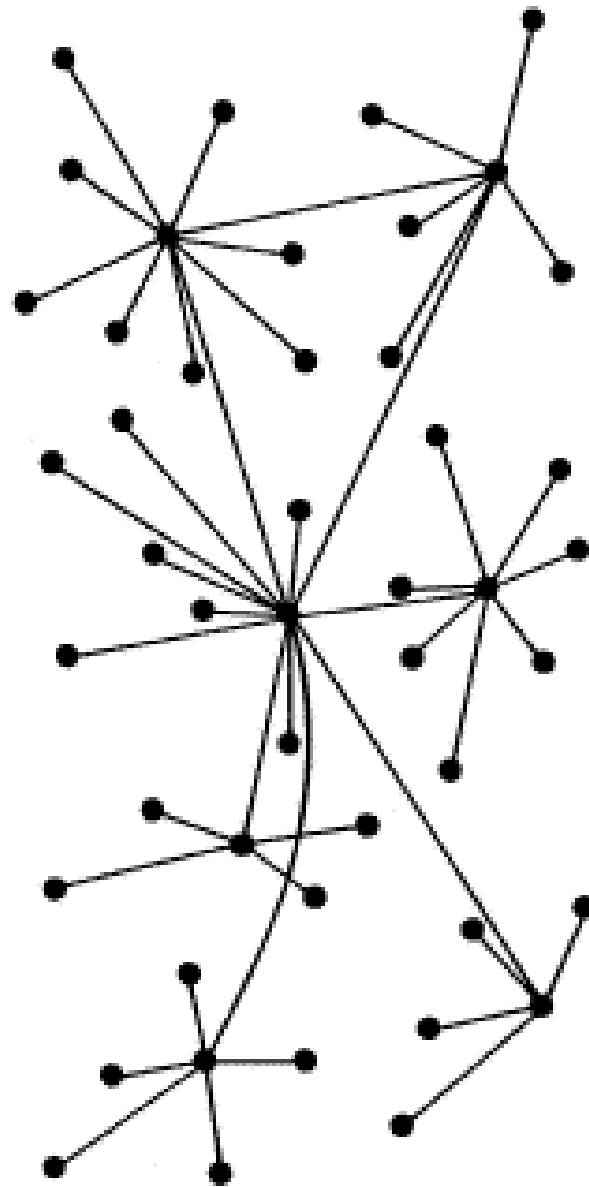


IU Libraries Functional Areas



Kuali OLE Core Team at IU





Decentralized Network of Networks

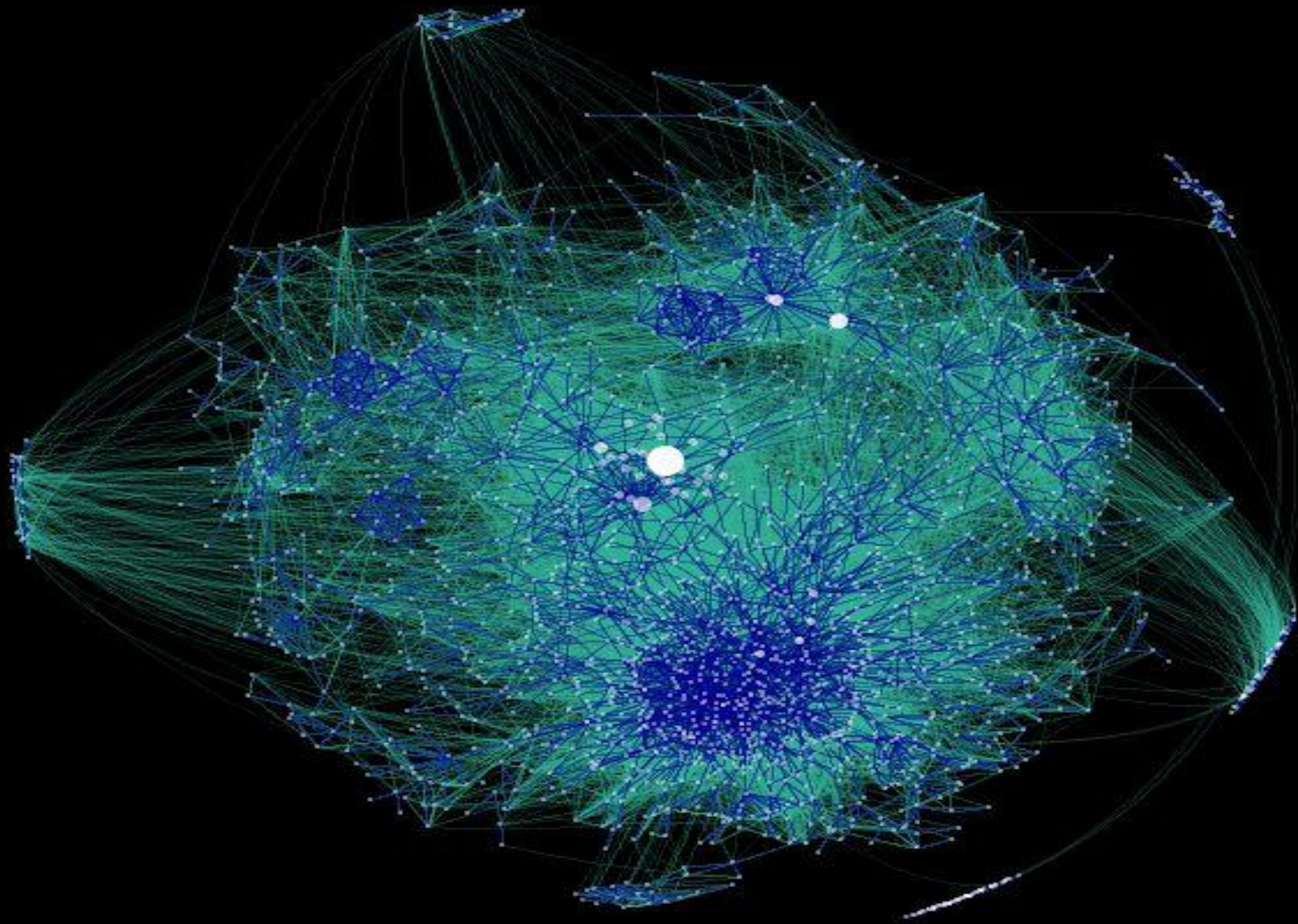


Illustration of What Kuali OLE Could Be

- Not just an ILS – not just NOTIS
 - Breaks out of the single data model based on bibliographic representations of physical books
 - Include licensed resources
 - Archival descriptions
 - Multiple access points
 - Multiple delivery mechanisms in partnership
 - Access by common tools – i.e. Zotero
 - Integrate data flows from multiple sources
 - Vendors/Local Systems/Cloud Services
 - Sophie/Matterhorn/Kultura/Bedework/uPortal

Kuali OLE Partnership Growth

- Challenges for Growth
 - System must scale down
 - All types of academic libraries must be included
- Developing Anchor Institutions
 - Engaging others in development outside of Kuali OLE
 - Developing subscription or donation model for expanding the network across multiple library types

Kuali OLE – Where to go Next?

- Are we ready for a cultural heritage sustainability community
 - Ex. Kuali Culture or JASIG Culture
 - Galleries | Libraries | Archives | Museums
- How do we deliver a funding model when we extend it beyond administrative data systems?
- Micropayments for sustainability communities?

More on Kuali OLE

- Robert H. McDonald, Executive Director Kuali OLE
- robert@kuali.org
- <http://www.kuali.org/ole>
- Kuali News - <http://feeds.kuali.org/KualiNews> 
- Kuali OLE on twitter - @kualirole 
- November 8-10 2010 – Kuali Days 2010 San Diego, CA