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LIBRARY STARTUP: BUILDING A SUSTAINABLE SOFTWARE COMMUNITY FOR ACADEMIC LIBRARIES THROUGH KUALI OLE

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Duke University



OLE DESIGN PHASE PARTNERS

- Regional Design Workshops
- 500+ people from 95 institutions!





KUALI OLE PARTNERS



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

MOVING FROM OLE TO KUALI OLE

- First Analyzed a Sustainable Business Model
 - Needed Matching Funds and Matching FTE
- Wanted 501c3 Organizational Structure
 - Community Supported
 - Community Governed
 - Join or Build
- What is the Administrative Overhead?
- Can OLE Partners share funds for short and long-term sustainability?
- Will there be long-term support for software dissemination?

KUALI OLE GOVERNANCE

- Follows Kuali Foundation Governance Model
- Software Application Board
 - Co-Chairs to represent this collaboration:
 - Deborah Jakubs – Duke University
 - Brad Wheeler – Indiana University
 - Executive Director
 - Functional Council
 - Technical Council
- Core Project Team at Indiana University
 - Project Manager
 - Software Development Vendor

KUALI FOUNDATION GOVERNANCE



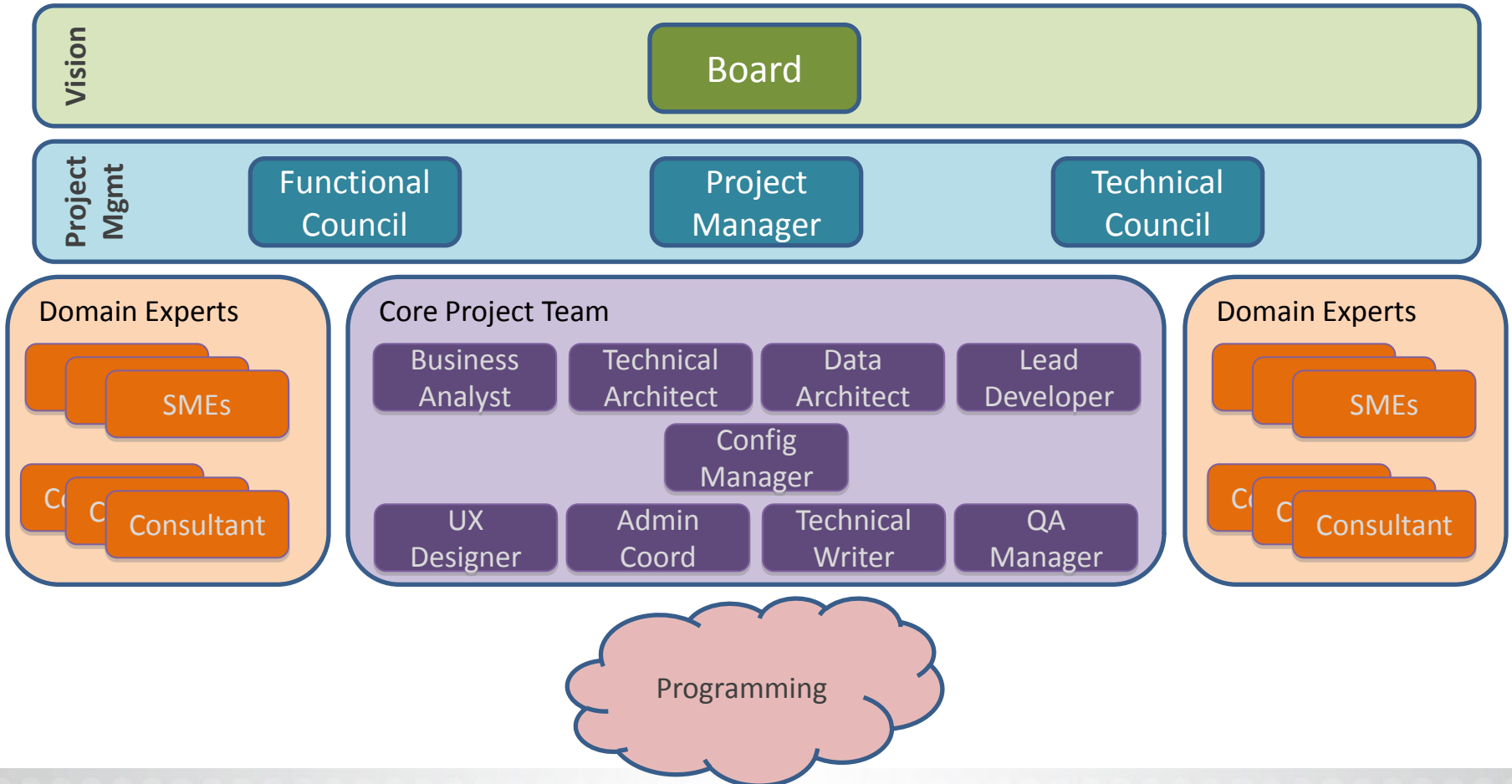
Application Roadmap Committee (ARC)



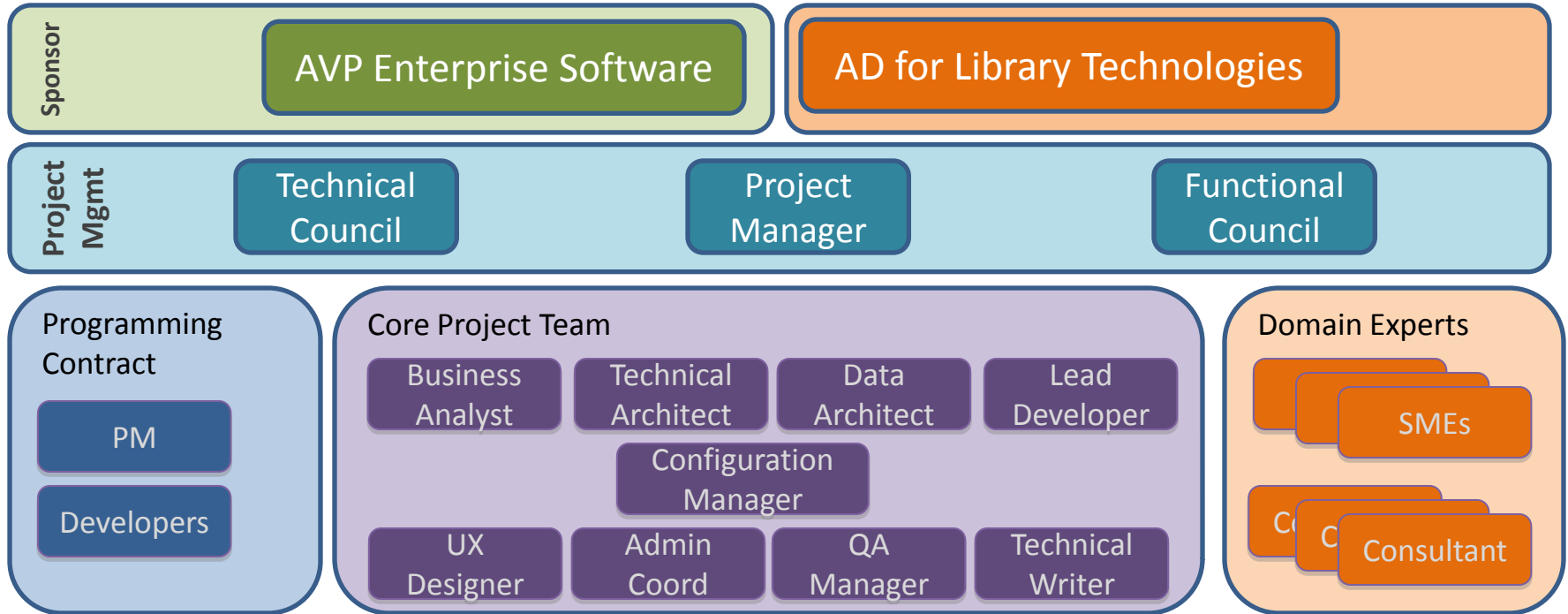
Technology Roadmap Committee (TRC)



KUALI OLE GOVERNANCE



KUALI OLE GOVERNANCE @ IU





COLLABORATIVE COMMUNITY

- 1 Part Community
- 1 Part Collaboration
- 1 Part Rice
- = Kuali OLE



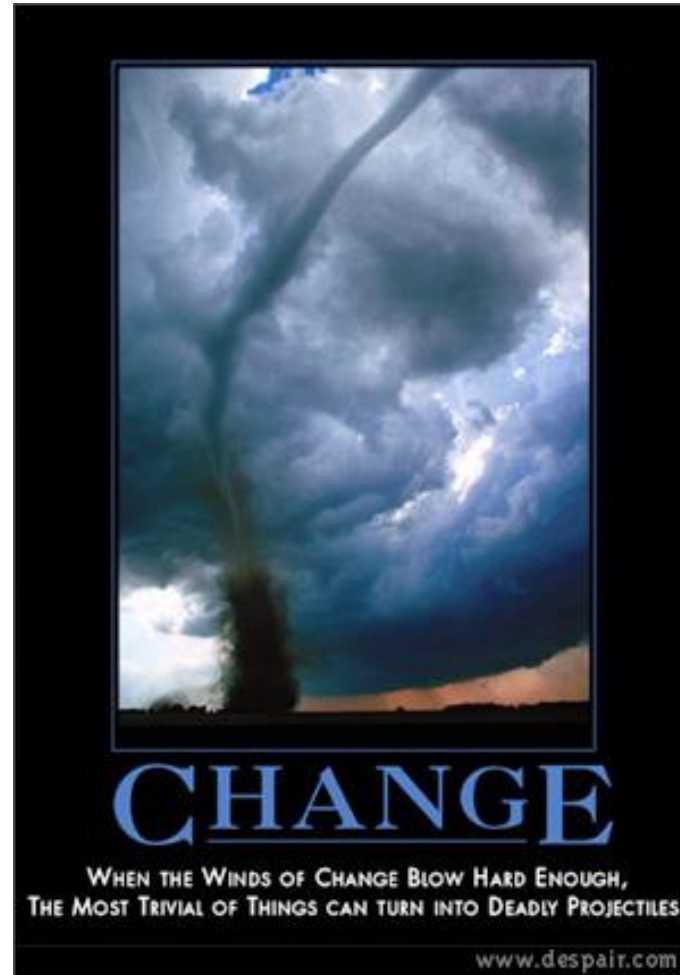
THE FIRST 4 MONTHS

- Funded July 2010 – June 2012
 - From the Mellon Foundation
 - Cash from Partners – skin in the game
- Building the teams
 - Board, Functional Council & Technical Council – Drawn from the Partners
 - Hiring the Core team – Hired from project funds

THE FIRST 4 MONTHS

- Building on the plan
 - Developing our data model
 - Inventories of target integrations
 - Critical financial core integration
 - Other enterprise and domain integrations
 - Developing process for functional specifications
- Securing development capacity
 - Few resources within libraries for enterprise-level development
 - Competitive RFP for a development partner

LEADERSHIP CHALLENGES



USER STORY FUN

As an
Orderer/Acquirer...

... *I encumber funds* to buy materials
for different libraries.

- *I encumber funds* to fulfill requests for specific programs, e.g. Kindles.
- *I encumber funds* to buy books for subject-specific research and courses.
- *I encumber funds* to order books paid by a federal grant.
- *I encumber funds* to acquire course books for Reserves.
- *I encumber funds* to acquire qualified titles requested for ILL.

WORKFLOW OR WORKAROUND

- Creating funds for specific formats to enable reporting on that format
- Import files from bibliographic utility and add local holdings
- Create multiple invoices to track funds within library system and in university procurement system

TECHNICAL DIRECTION(S)...

MARC

ONIX

EDI

SUSHI



COUNTER

RDA

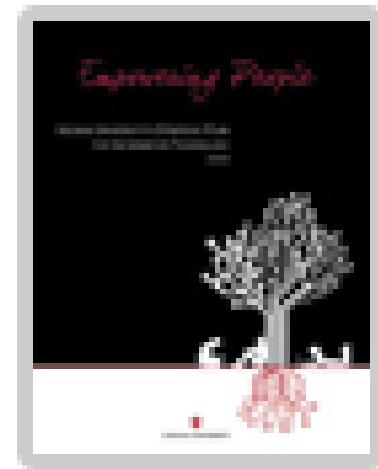
ERMI

VRA

CAMPUS PERSPECTIVES

COMMUNITY SOURCE AT IU AND EMPOWERING PEOPLE

- Empowering People is the current IU IT Strategic Plan
 - Developed Fall 2008-2009
 - <http://ep.iu.edu/>
 - Action Item 70 (70a)
 - IT-enabled Research





INDIANA UNIVERSITY

BUILDING IT LEADERS WITH COMMUNITY SOURCE IT-ENABLED RESEARCH

- Kuali Foundation Applications serve as long-term professional development opportunities for IU Staff at IU
 - Kuali Finance
 - Kuali Coeis
 - Kuali OLE
 - Kuali Student
- Opportunities for Leadership
 - Project Manager
 - Functional Council Leads
 - Technical Council Leads
 - Lead Developers
 - Lead Architects

DUKE LIBRARY/IT ENTREPRENEUR



- Advances leadership role of library in information technology
- Builds partnership with central IT
- Staff development opportunity
- Models change in a community often viewed as rigid



NEW IT COLLABORATIONS

- Getting what we want through direct involvement & direction of product development
 - Growth of technical expertise within the libraries
 - Experience with enterprise-level development
- Mixing how we want
 - Integration with our local enterprise systems – IdM, BenFinancials, Courseware, Discovery, Repository
 - New avenues for on-campus collaboration as we work at the enterprise level



NEW IT COLLABORATIONS

- Sustaining & growing the effort
 - More than we can do by ourselves in the Libraries
 - Need the community to sustain the software
 - Common interests help grow partnerships & solutions
- Linking things together
 - Create new synergies for advancement in
 - Management of licensed content
 - Courseware integration
 - Discovery tool federation
 - Standards-based framework provide platform for new solutions & integrations

EDUCAUSE 2010
CONFERENCE ANAHEIM
THE BEST THINKING IN HIGHER ED IT



THANK YOU!
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