

FOLIO Vision, Strategic Objectives and Initiatives

December 2020

Introduction

A working group was formed by the Product Council to enumerate high level Vision, Strategic Objectives and Strategic Initiatives for the FOLIO project. These are intended to serve several purposes:

1. Help set context and a direction for the project so that more detailed tactical planning can be done in alignment with strategic goals
2. Provide a structure for the project's community to periodically reassert its strategic goals and intentions
3. Allow the community to have a single, shared understanding of where we want FOLIO to go in the future

This document is the result of many, many hours of consideration and collaboration by the 15 member working group. The work defined the following concepts as a strategic framework:

- **Vision** - The highest level and most general part of our strategy. What is FOLIO? Aspirationally, what do we want to achieve with FOLIO, how do we want it to be seen, and what do we want its impact to be?
- **Strategic Objectives** - The next level of specificity and time-based. Within a certain date, what are the things that we want to have achieved or be able to say about FOLIO. These help us achieve our Vision.
- **Strategic Initiatives** - More granular and directive, actions we want to be taken in order to support the accomplishment of our Strategic Objectives.

Some of these objectives and initiatives are specific and tangible. Others are more aspirational and/or directional. This is recognized, and we believe both are valuable.

Who will do all of this?

There's a lot of aspirational work to be done if we want to achieve this strategy. The group did not attempt to "assign" anything to any group, but rather would rely on the community, and more specifically the Councils that are part of the Governance Model, to find ways to get this work done. The Governance Model that is being finalized and rolled out (expected to be in place by January 2021) should make it clear which Council will be responsible for which items in our Strategic Objectives and Initiatives.

Ultimately, as an open source community and project, it's up to all members to make sure our goals are achieved.

How does this Strategy translate into Action?

The intent of developing this framework and completing these lists was to provide guidance and context for the decisions that we make each year, quarter, month, release, sprint and even every day. It's essentially a high level "to-do" list that we can constantly reflect on.

Many of the items relate to software features, functionality, and capabilities. For these items the roadmap and release planning process will now have directional guidance as to which areas to invest time and resources into that will have the most strategic benefit. It will be consulted as the roadmap is developed. We'd expect Epics to generally align with Strategic Initiatives.

There are plenty of items that are about community building or where FOLIO fits in the marketplace. The appropriate leadership councils will have to develop plans to accomplish these goals.

FOLIO Strategy

Vision

The Future Of Libraries Is Open -- Be FOLIO - An open community supporting the evolving needs of global libraries with a platform that serves us now and into the future.

Dimensions to consider for Strategic Objectives and Initiatives

- Community
- Features and Functionality (F&F)
- Fit in Marketplace
- Reliability, Quality, Stability and Performance (RQSP)
- Sustainability
- Total Cost of Ownership (TCO)

Mid 2021

Strategic Objectives for Mid 2021

1. FOLIO meets or exceeds library requirements for quality, performance, and stability {RQSP}
2. FOLIO demonstrates strategic advantages that allow libraries to choose their level of financial investment, scope of functionality, and implementation partners {Fit in marketplace, TCO control}
3. FOLIO fosters an active, diverse, and growing international community {Community}
4. FOLIO promotes engagement by the community with a clear governance model {Community, Sustainability}
5. FOLIO follows a clearly defined community-created roadmap for planned functionality {Community, Sustainability, F&F}
6. FOLIO represents a viable option of enough support, functionality, and stability for libraries to implement and for service providers to support {Fit in Marketplace, F&F, Community}
7. FOLIO enables consortia in a single tenant and is working to support cross-tenant consortial needs

Strategic Initiatives for Mid 2021

1. Implement a documentation framework
2. Provide sufficient documentation for implementers to set up and configure functional apps
3. Develop a support process within the community for FOLIO adopters
4. Implement the highest priority features that the community has ranked
5. Clearly document library requirements for performance - e.g. 2 second response time for page loads, batch upload of 10,000 MARC records in 3 minutes, etc. and secure realization
6. Clearly document the library requirements for stability (Mean Time Between Failures [MTBF], Mean Time To Repair [MTTR]) and secure realization
7. Provide a registry of known service providers with their focus / profile
8. Measure implementers satisfaction
9. Define and document FOLIO's scope of functionality
10. Develop an Implementers SWOT Analysis
11. Define cross-tenant architecture to be used by FOLIO
12. Actively recruit libraries worldwide that have a proven track record with open source development projects and have the experience and resources that would benefit FOLIO
13. Conduct Hackathons, webinars and other outreach efforts to spread the word about FOLIO
14. Revise the current ranking, prioritization and staffing process to ensure it has the transparency the community desires
15. Ensure the roadmap includes longer term, architectural and resource requirement considerations
16. Actively recruit libraries that can leverage FOLIO integrations, thereby lowering staff costs, as well as maintenance costs for other systems, and therefore can demonstrate a lower TCO with FOLIO
17. Develop an Implementers acceptance testing feedback loop that leverages real world system experience for the betterment of the whole community, including feature review and effects on capacity planning
18. Implement the new governance model
19. Promote and illustrate the benefits of FOLIO's community-owned reporting capability in partnership with the Library Data Platform (LDP) project to increase adoption of the FOLIO platform.
20. Support and sustain continuing development of reporting features in the service of libraries

Mid 2022

Strategic Objectives for Mid 2022

1. FOLIO cultivates a strong, independent, responsible, growing, and self-supporting community {Community}
2. FOLIO operationally runs over 80 libraries in at least 5 languages {Fit in Marketplace, Community, F&F}
3. FOLIO enables painless onboarding of new development partners with excellent documentation {Community, Sustainability}
4. FOLIO Implementers' satisfaction ratings are over 90% {F&F, Fit in Marketplace, Others}
5. FOLIO functionally allows all members of a consortium to operate successfully {Fit in Marketplace}
6. FOLIO offers innovative features not found in other LSP products {F&F, Fit in Marketplace}
7. FOLIO grows its numbers of commercial providers {Community, Sustainability}
8. FOLIO meets or exceeds library requirements for quality, performance, and stability {RQSP}

Strategic Initiatives for Mid 2022

1. Create a painless onboarding process for new development partners with excellent documentation
2. Advertise benefits of FOLIO to encourage additional developer resource contributions or funding
3. Form and support User Groups, carefully ensuring fit with existing groups and SIGs
4. Conduct surveys of recent development partner additions to identify areas that can be improved
5. Create a global promotional program for FOLIO - presentations, testimonials by implemented libraries - spreading the word that FOLIO is **working** in several libraries
6. Identify opportunities like "FOLIO School" and creation of other training programs that help adoption
7. Develop and distribute an Implementers' Satisfaction Survey
8. Support cross-tenant architecture and functionality that enables consortia using multiple tenants
9. Carry the Roadmap past basic implementation and include features not found in other LSPs
10. Revive Linked Data Working Group to make sure that FOLIO's use of Linked Open Data (LOD) follows LOD principles, and is useful and meaningful to the community

11. Support community initiatives to foster creative, innovative processes, engage experts and promote leadership and responsibility, e.g. through (regional) working meetings, WOLFCON, etc.
12. Build up project structures to enable people to take ownership of defined parts of the project
13. Identify areas of opportunity for improvement via Implementers' Satisfaction Survey and prioritize their implementation
14. Support and sustain continuing development of extended functional and reporting features in the service of libraries

Somewhere between 2023 and 2025

Strategic Objectives - 3-5 years out (2023-2025)

1. FOLIO meets or exceeds library requirements for quality, architectural integrity, performance, and stability {RQSP, F&F}
2. FOLIO supports multiple metadata standards and multi-schema environments, including apps that natively support linked data schemas {F&F, Fit}
3. FOLIO enables and encourages a thriving app development ecosystem with multiple modules to choose from for core functionality {Community, Sustainability}
4. FOLIO is widely adopted, including by libraries beyond traditional types such as museums and other cultural institutions {Fit, Community}
5. FOLIO demonstrates competitive cost effectiveness {TCO}
6. FOLIO is supported by a wildly enthusiastic and engaged user community {Community}
7. FOLIO has a successful funding team to ensure the necessary resources to realize our vision, objectives, and initiatives {Sustainability, Community}
8. FOLIO has evolved beyond the initial core apps in ways we can't currently envision or predict {Fit, F&F}

Strategic Initiatives - 3-5 years out (2023-2025)

1. Develop "horizon scanning" and innovation processes to ensure FOLIO is responsive to emerging trends within the FOLIO community and beyond
2. Build feedback mechanisms to process functional needs and comments from organizations that are not deeply involved in the development process
3. Incorporate an "innovation summit" as part of WOLFcon
4. Ensure the roadmap process regularly incorporates feedback from annual Implementer Satisfaction Surveys
5. Create an app store and incentivize the addition of apps to the store by individuals, institutions, and commercial partners
6. Develop support for non-MARC record-based data models (for instance: Dublin Core, VRAcore, PBCore, FGDC)
7. Support entity-based data models, as well as interchange with linked open data, including BIBFRAME
8. Ensure robust communication surrounding the maintenance and development of core FOLIO APIs
9. Ensure we have a capable funding team to identify and secure a sustainable flow of resources
10. Align FOLIO initiatives with other open source development communities in other cultural heritage disciplines
11. Integrate other library functions such as special collections and archives into FOLIO
12. Seek out opportunities and funding sources that take FOLIO beyond an ILS-replacement focus
13. Promote new libraries and service providers in the FOLIO community
14. Integrate the FOLIO community into library and information science education and professional development channels
15. Promote and illustrate the capability for an institution to move between hosting environments (including to/from self-hosting) and change support providers
16. Evolve the current SIG structure to create a FOLIO User Group that has an established presence and infrastructure to support users and inform further development (e.g., website, listserv, other formal & informal avenues for exchange of information)
17. Support and sustain continuing development of reporting features in the service of libraries, e.g. the inclusion of institutional data and other data sets

PC Vision and Strategy Working Group - October-December 2020

- Cate Boerma (EBSCO)
- Sara Colglazier (Mt Holyoke/Five Colleges)
- Kelly Drake (FLO)
- Mike Gorrell (Index Data) - Facilitator
- Dracine Hodges (Duke)
- Kirstin Kemner-Heek (GBV)
- Jesse Koennecke (Cornell)
- Ian Ibbotson (Knowledge-Integration)
- Peter Murray (Index Data)
- Maike Osters (HBZ)
- Paula Sullenger (Texas A&M)
- Gar Sydnor (EBSCO)
- Christie Thomas (Chicago)
- Tom Wilson (Alabama)
- Laura Wright (Cornell)