Kuali OLE:
A Next-Generation ILS Partnership

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What is Kuali OLE?

Kuali OLE (Open Library Environment) is a community source next-generation library management system developed through a partnership of research libraries with the Andrew W. Mellon Foundation.

OLE is building a next-generation library system meeting the following requirements:

- Flexibility in design
- Community ownership based on an open source license
- Service-Oriented Architecture with a modular framework
- Enterprise-level integration
- Efficiency in ability meet both current and future business needs
- Sustainability in design to allow for the evolution of software, hardware, and mission
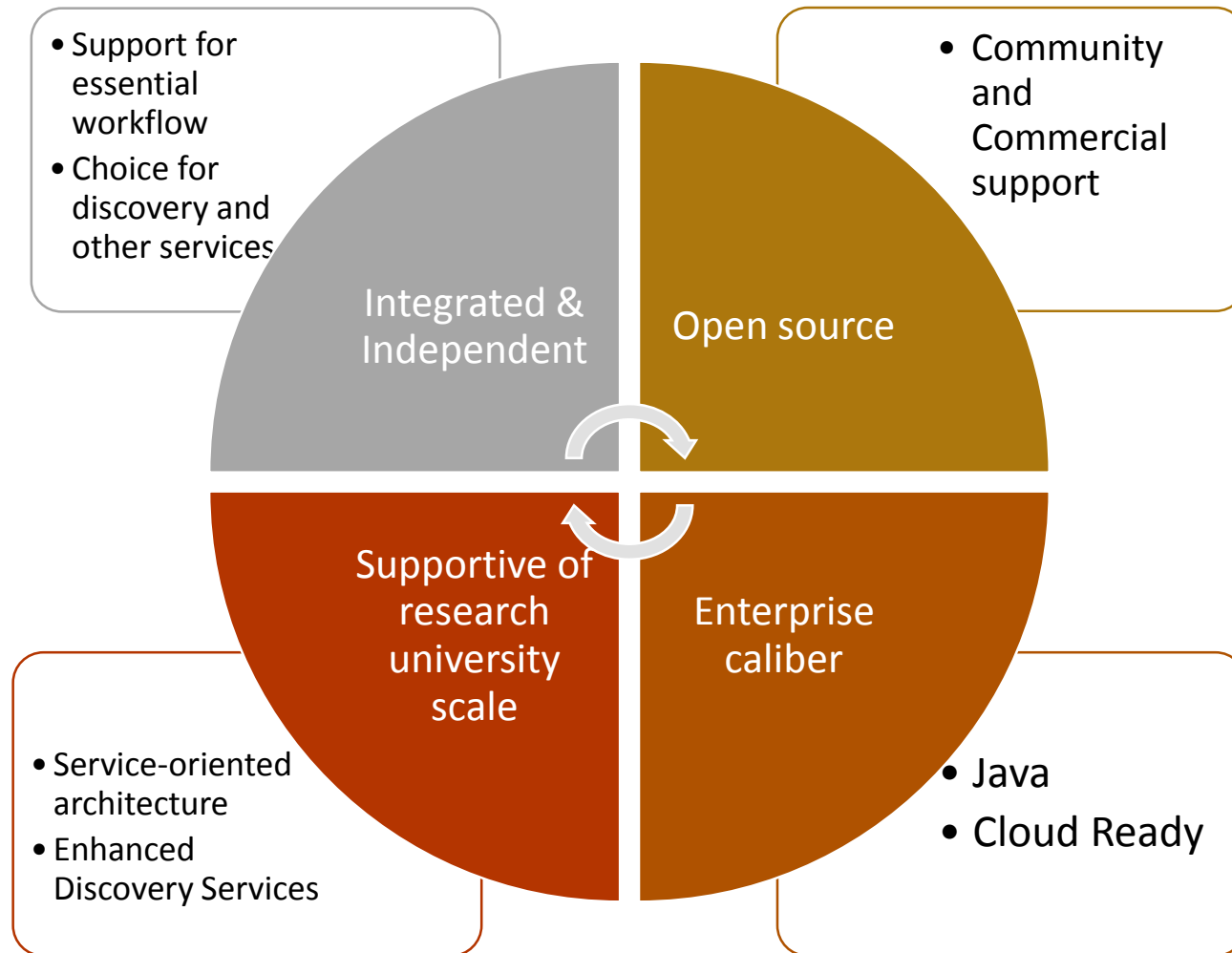
What is Kuali OLE?

Kuali OLE (Open Library Environment) is also an open partnership among academic libraries to provide for our evolving needs.

OLE: Participation and Sustainability
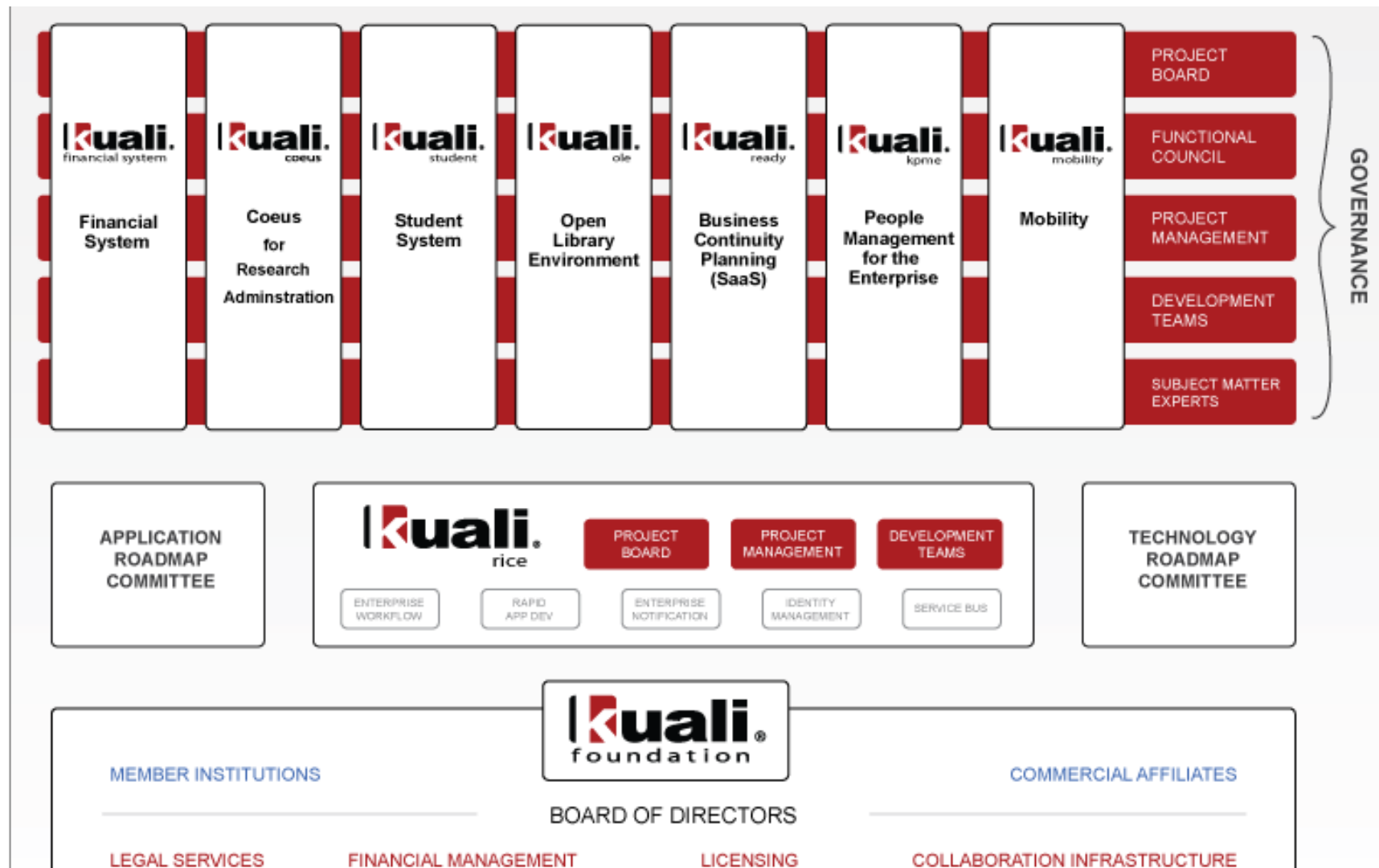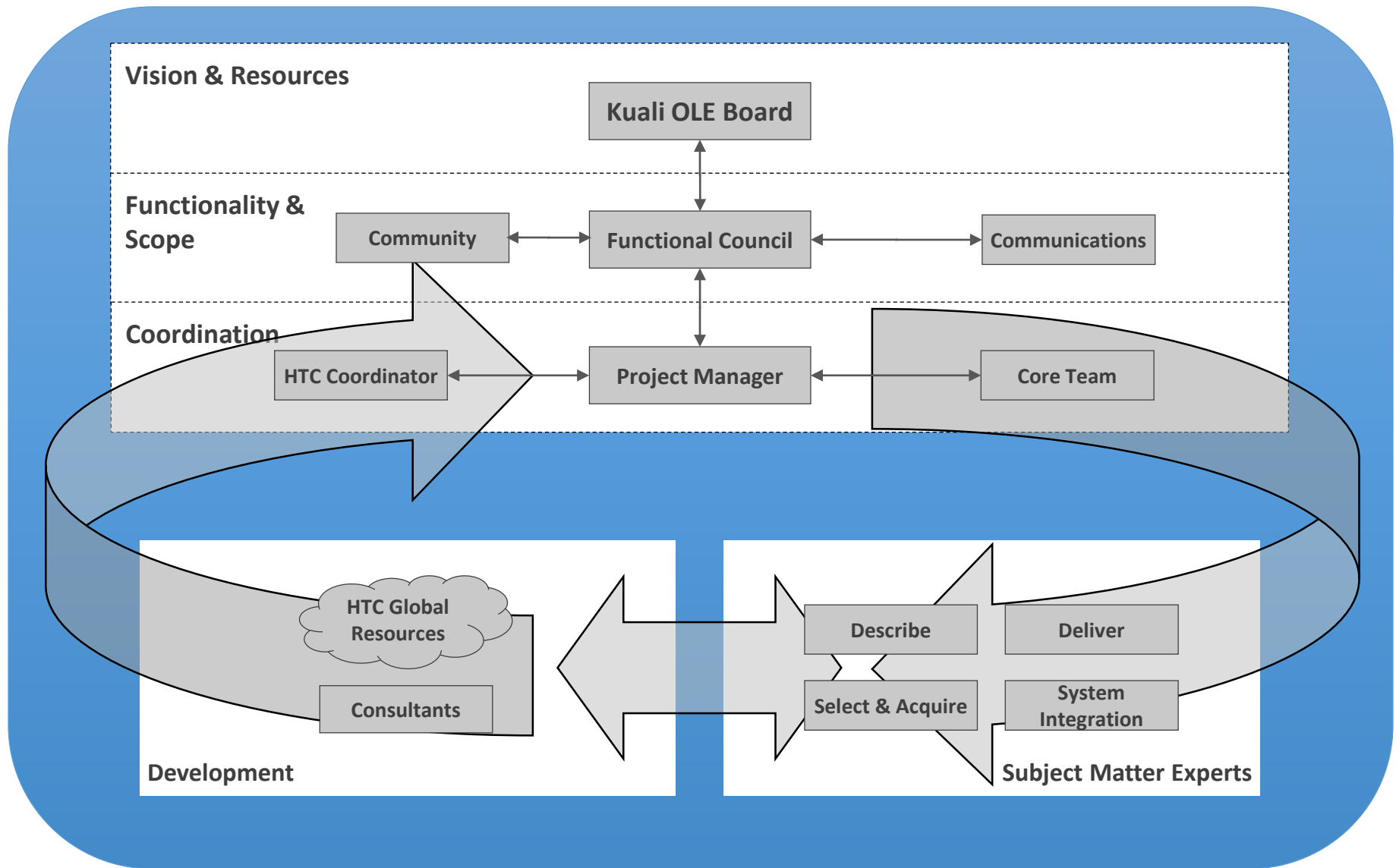
Kuali OLE Characteristics

- Support for essential workflow
- Choice for discovery and other services

- Community and Commercial support

Integrated & Independent

Open source

Supportive of research university scale

Enterprise caliber

- Service-oriented architecture
- Enhanced Discovery Services

- Java
- Cloud Ready

The Kuali Foundation and OLE

Kuali OLE Organization

OLE Collaborators

Kuali : the newest addition to **EBSCO's suite** of **ILS Partners**

EBSCO and Kuali form a tight relationship to offer seamless interaction between the **leading discovery solution**—*EBSCO Discovery Service*— and the **high-end, open source ILS**—Kuali OLE.

EBSCO has been a KCA since March 2013

Supported by Co-Conference Presentations on Discovery

OLE Partners have worked directly on EDS/OLE Interoperability

Sponsorship for OLE Events
Kuali Days & Kuali Days UK

Partnership synergy is EDS + Backend Open Source Library Management System

Kuali & **EBSCO** Discovery Service
open library environment

Advancing discovery capabilities within the Kuali Community.

Expected release 2014
www.ebsco.com

The Current ILS

Public Catalog

So, the ILS helps libraries manage...

deliver

discover

store

acquire

Staff Interfaces
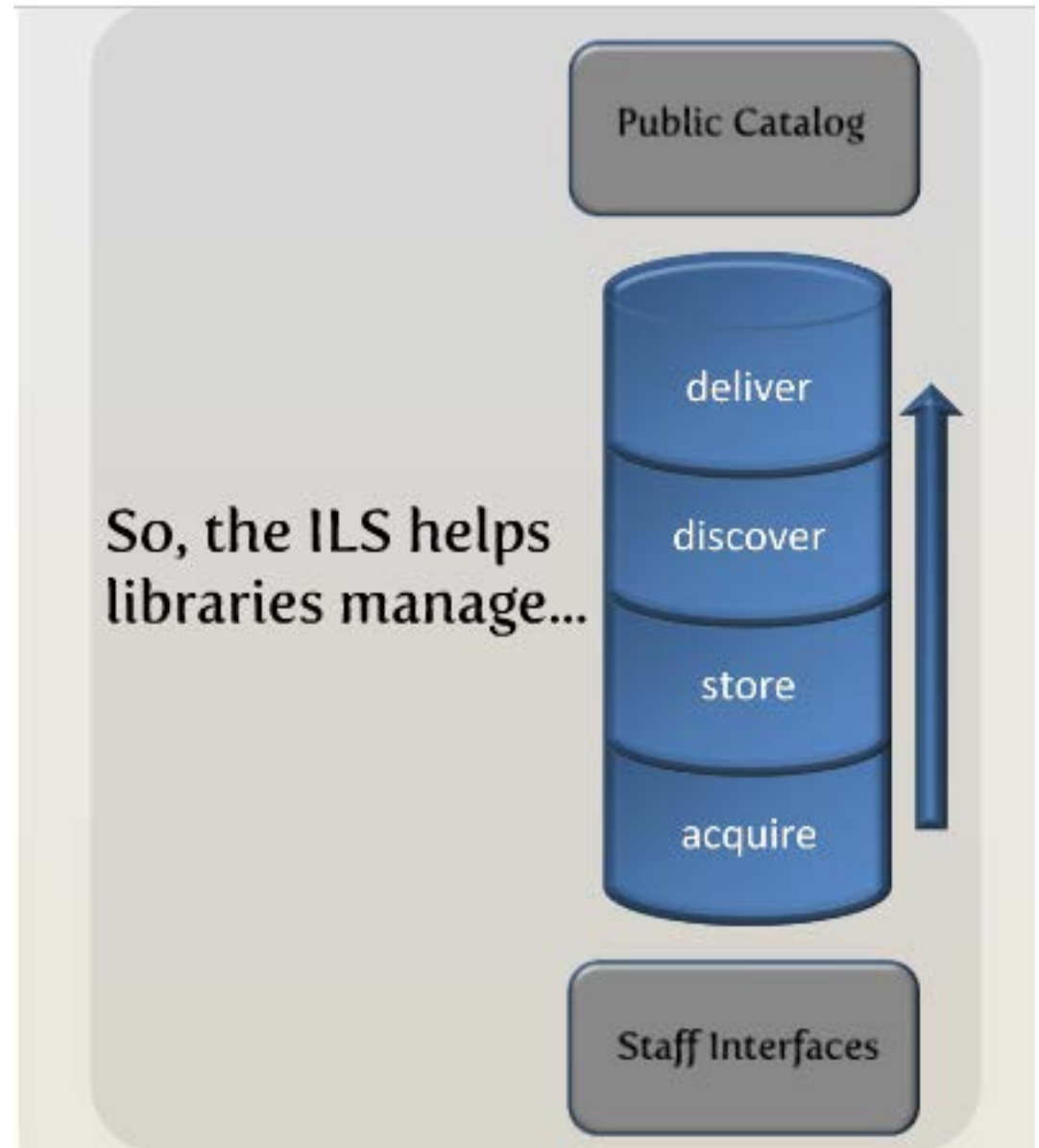
The Next Generation Library Eco-System
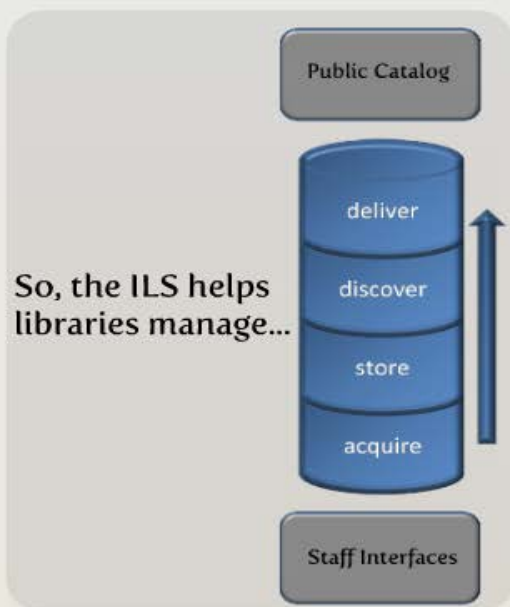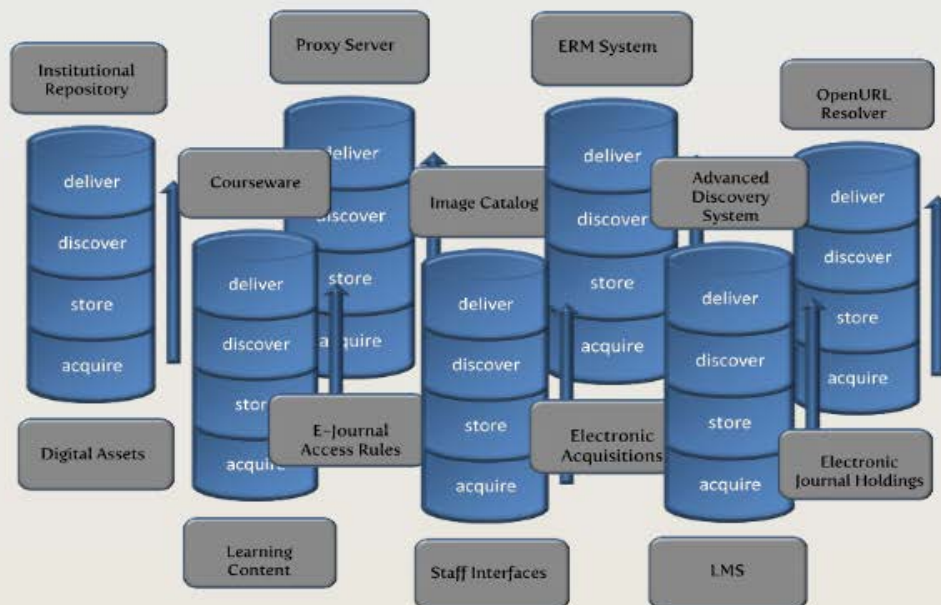
The Global Open Knowledgebase (GOKb)

- Andrew W. Mellon Grant, April 2012-March 2013
- Knowledgebase for Kuali OLE
- Build a Global Open Knowledgebase (GOKb) that will be community maintained
- Focus on data management and integration services

GOKb Key Deliverables

- Open knowledgebase using a standards-based architecture, CC0 license
- Enhanced global data elements
- APIs to interact with data—emphasis on ingest and maintenance

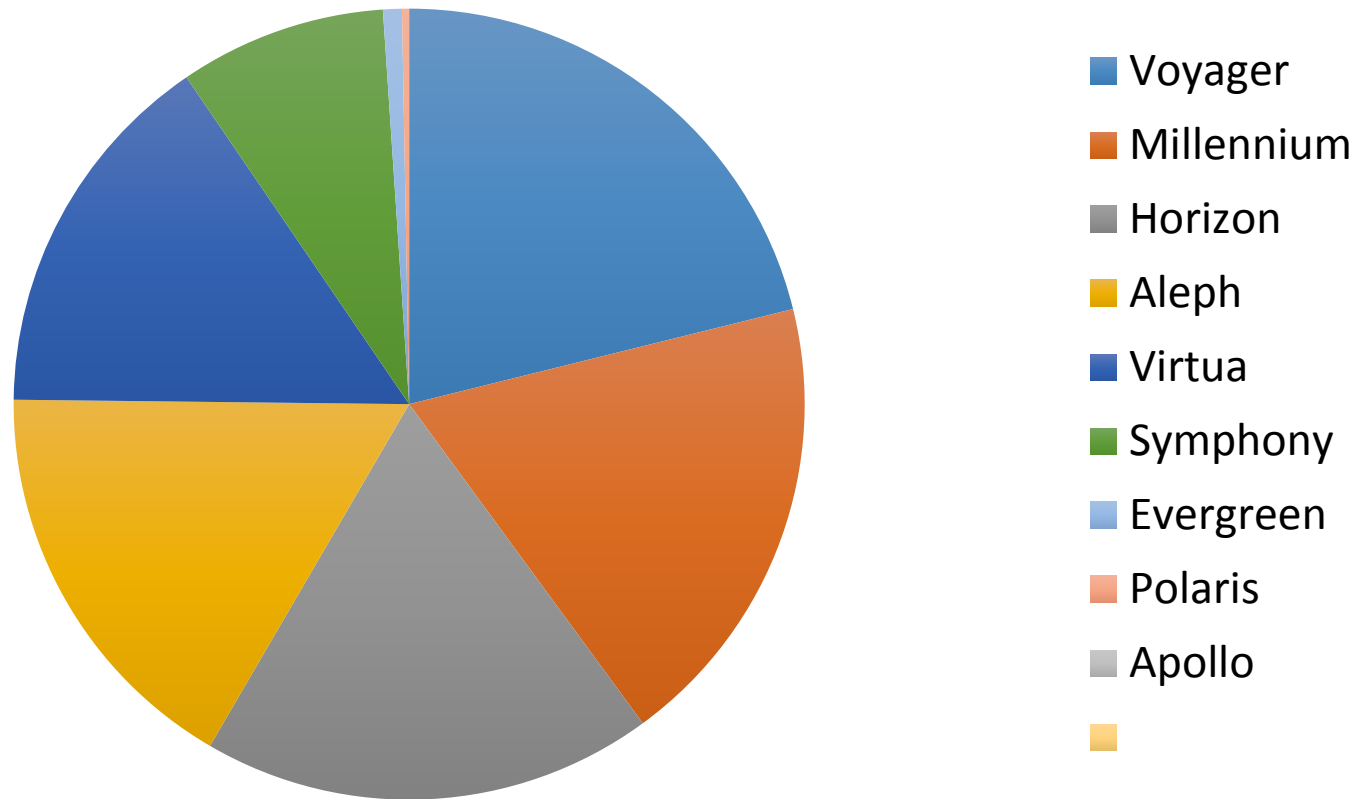# GOKb, KB+ and Kuali OLE

- Kuali OLE building a community source library management system
  - Mellon commissioned a feasibility study, 2008-9
  - Funded build project, 2010-14 : $4 million from Mellon, $4 million from partners
- GOKb Version 1.0 – basic functionality of GOKb by 2013.

In Transition:
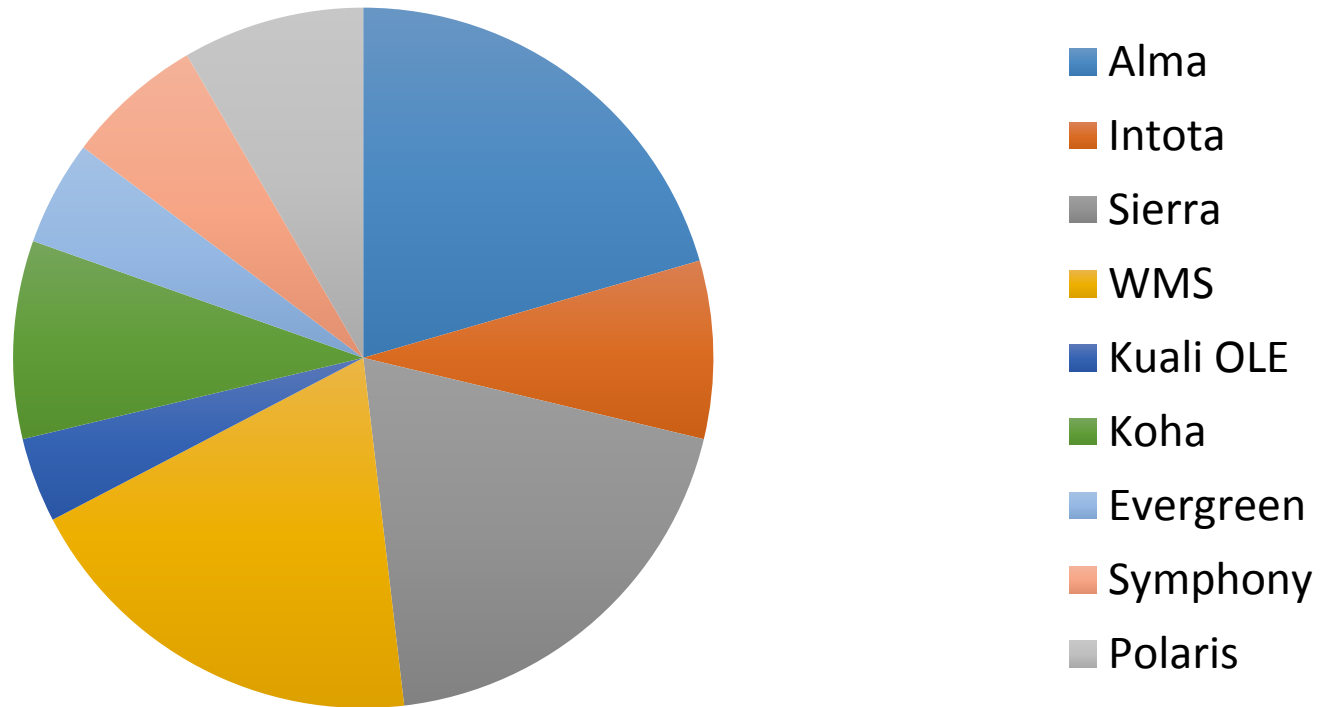# The Current Library Management System Landscape

Systems of Libraries Considering Migration 2013

Legend:
- Voyager
- Millennium
- Horizon
- Aleph
- Virtua
- Symphony
- Evergreen
- Polaris
- Apollo

• Perceptions 2013: An International Survey of Library Automation – Marshall Breeding http://www.librarytechnology.org/perceptions2013.pl

In Transition:
The New Library Management System Landscape

Candidate Systems Considered for 2013

Legend:
- Alma
- Intota
- Sierra
- WMS
- Kuali OLE
- Koha
- Evergreen
- Symphony
- Polaris

- Perceptions 2013: An International Survey of Library Automation – Marshall Breeding http://www.librarytechnology.org/perceptions2013.pl

Key Kuali OLE Release Information

- April 2014 1.5
  - Complete baseline ILS: functionality across 4 of 5 modules
  - First upgradeable release

- 4Q 2014: 2.0
  - Electronic Resource Management (GOKb e-Resource knowledge base integration)
  - Critical features for the next wave of partner implementations

Kuali OLE 1.5 Interface

Kuali OLE Release 1.5 (April 2014)

Select

Acquire

Describe

Deliver

Manage
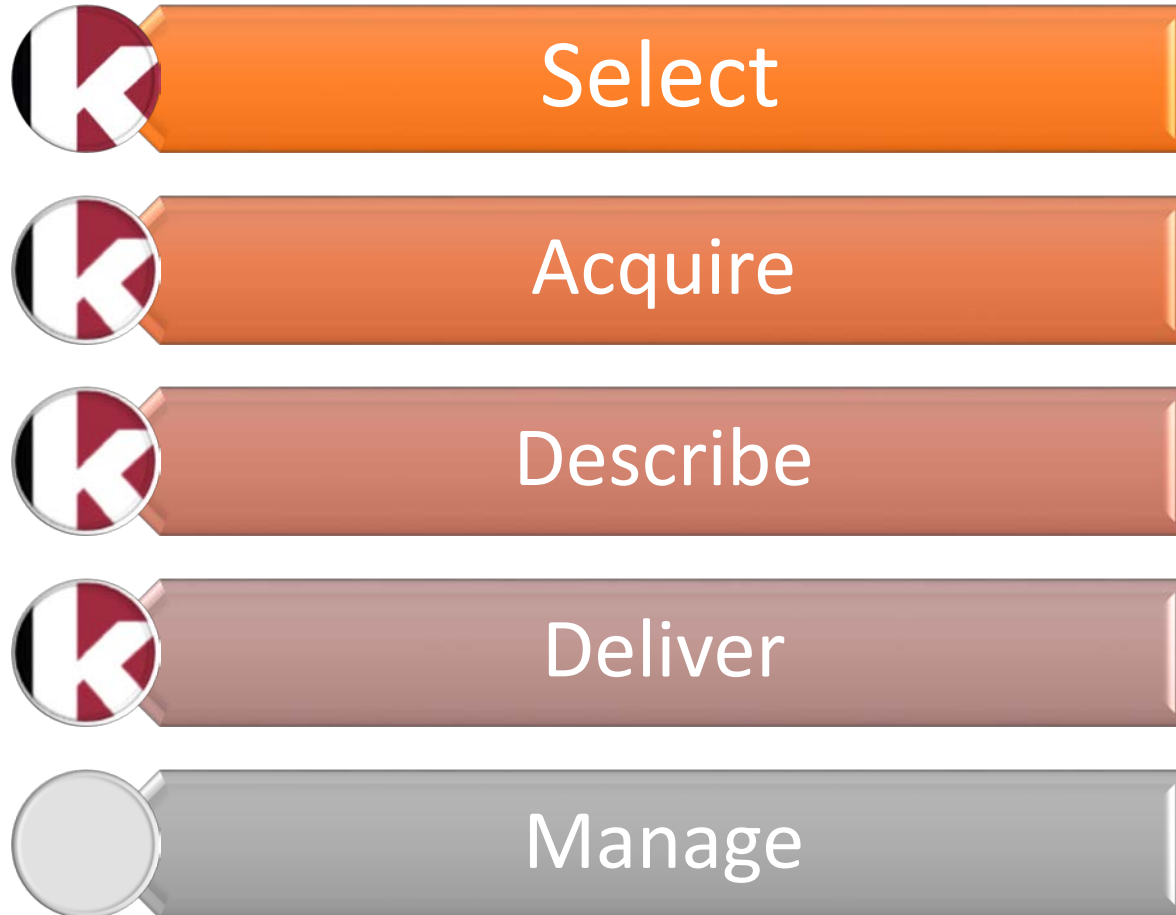
Kuali OLE Release 2.0: Q4 2014

Select

Acquire

Describe

Deliver

Manage
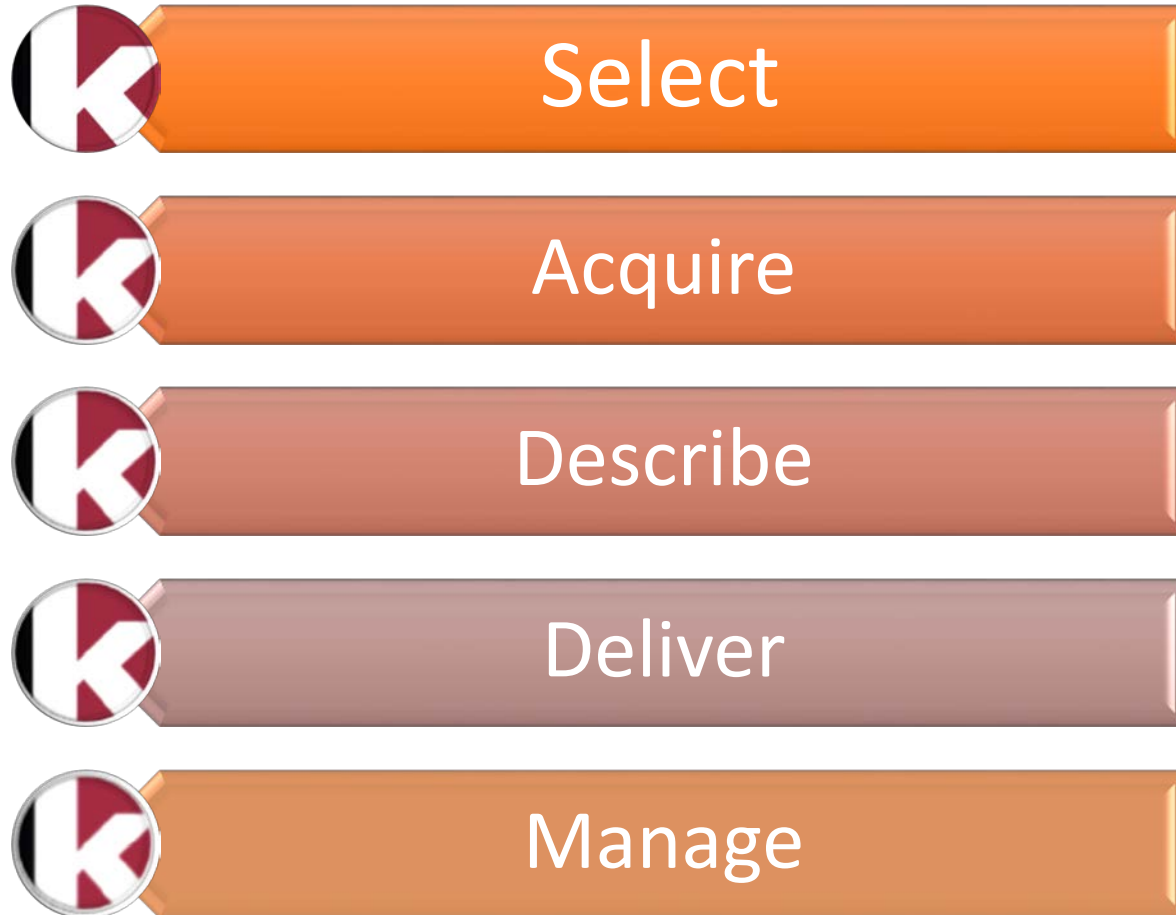
OLE Partnership Implementation Timeline

Implementation Path for OLE Partners

Summer 2014
- University of Chicago

Lehigh University
Bloomsbury Consortium (UK)

Summer 2015
- University of Pennsylvania
- Villanova University

Duke University
North Carolina State University

Winter 2015

Indiana University

Summer 2016

Florida Consortium

Winter 2016

- University of Maryland

Characteristics of Kuali OLE Organizational Fit

Technical Expertise

Collaborative Community

Open Software – Commercial Support
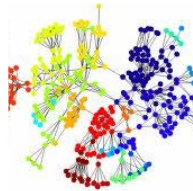
Code Contributors
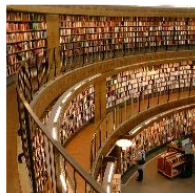
Code Implementers

- Build
  - Active contributors to code base
  - Significant development resources in house

- Borrow
  - Capability to adopt and implement open source software
  - Some development resources in house

- Buy
  - Organizational requirement to purchase commercial software or software with commercial support
  - Development and hosting supportfor OLE available via KCA Commercial Affiliates (HTC Global, Vivantech)

Kuali OLE A Rocky Mountain View

- What do I Install First?
  - Discovery Layer
  - Other Integrations
    - Financial
    - Student
    - Interlibrary Loan
    - ILL/Resource Sharing
    - Self-check
- What data do I Migrate?
  - Descriptive Metadata (MARC->MARCXML/DC)
  - Financial Data/Transactional Data
- What kind of expertise do I need to participate?
- Will it run in the cloud?
- Can I run it in the local CARL or University Infrastructure?

Implementation and Purchasing for Kuali OLE

OLE Hosted Option

- Using one of our two KCAs institutions will opt for a contract that supports complete implementation - analysis, installation, migration, configuration, maintenance & support of Kuali OLE.

OLE Local Option

- Using local resources an institution will implement Kuali OLE on local or private cloud infrastructure and would rely on the Kuali OLE community for support and enhancement.

OLE Hybrid Option

- Select your competencies for local migration and implementation and out-source critical areas of deployment or migration, to leverage your resources and manage costs using commodity priced cloud infrastructure.

TO RFP OR TO PROTOTYPE

DEVELOPING PROCUREMENT OPTIONS FOR COMMUNITY SOURCE SOFTWARE

KUALI OLE

OPEN AND TRANSPARENT

CLOUD HOSTING SERVICES

PROTOTYPE TO PRODUCTION

Purchasing Recommendations

- OLE can respond to RFI/RFP Processes
- We recommend a Prototype Process (Used for Large Complex Systems Purchasing)
  - Develop prototype with our software
  - Test your own data in the environment
  - Limit spending to 10% of your eventual implementation budget (approx 50-60K)
  - Use commodity cloud resources to eliminate startup hardware costs
  - Determine if Kuali OLE is right for you:
    - Community
    - Software

GO FOR IT

ENABLE OPEN SOLUTIONS FOR YOUR INSTITUTION

OLE Costs and Sustainability

Current buy-in: 100k/80k for over/under 20 million in library expenditures
Growth: low = no change (10 partners), mid= 1 new member, high=2 members

Growth	Year Five (2015)			Year Six (2016)			Year Seven (2017)			Year Eight (2018)		
	Low	Mid	High	Low	Mid	High	Low	Mid	High	Low	Mid	High
Income	$925,000	$1,012,500	$1,100,000	$925,000	$1,100,000	$1,275,000	$925,000	$1,187,500	$1,450,000	$925,000	$1,275,000	$1,625,000
Core staff	$716,239	$716,239	$716,239	$737,726	$737,726	$737,726	$759,858	$759,858	$759,858	$782,654	$782,654	$782,654
Marketing	$18,500	$20,250	$22,000	$18,500	$22,000	$25,500	$18,500	$23,750	$29,000	$18,500	$25,500	$32,500
Development	$190,261	$276,011	$361,761	$168,774	$340,274	$511,774	$146,642	$403,892	$661,142	$123,846	$466,846	$809,846
Total	$925,000	$1,012,500	$1,100,000	$925,000	$1,100,000	$1,275,000	$925,000	$1,187,500	$1,450,000	$925,000	$1,275,000	$1,625,000

For more on Kuali OLE:

Visit our website: http://ole.kuali.org
See our Test-Drive - http://kuali.org/test-drives
Visit GOKb: http://www.gokb.org

Follow us on Twitter: @kualiole
Read our Blog at: http://kualiole.tumblr.com
Follow us on Ohloh - https://www.ohloh.net/p/kole

Contact me at: rhmcdona@indiana.edu
Or Twitter at: @mcdonald