

Flipping the Strategy

FOLIO Implementation at Five Six Research Libraries

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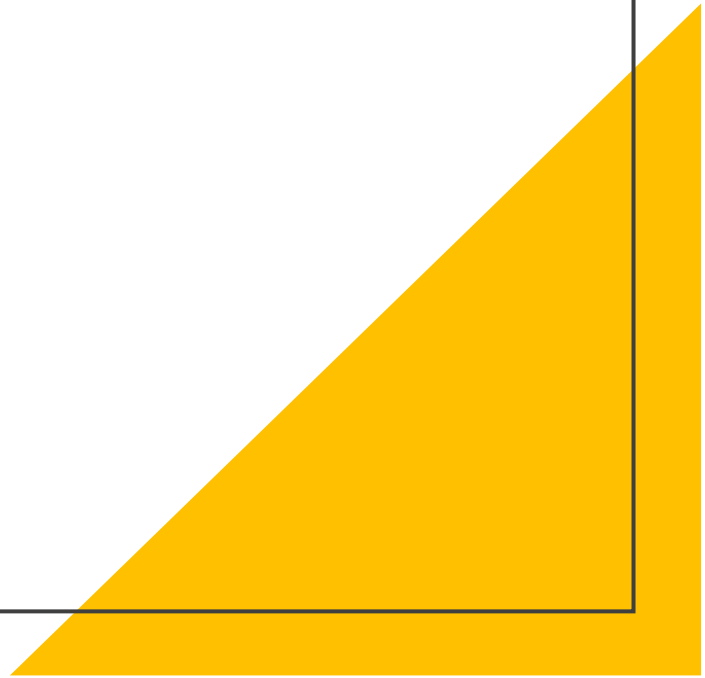
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Shawn Nicholson (Michigan State University)

Simeon Warner (Cornell University)

Tim McGeary (Duke University)

Tom Cramer (Stanford University)



What is FOLIO?

- FOLIO is an extensible library services platform.
- The FOLIO community is an open source, transparent collaboration of librarians, developers and vendors.
- An opportunity for libraries to actively shape key library infrastructure to meet current and evolving needs



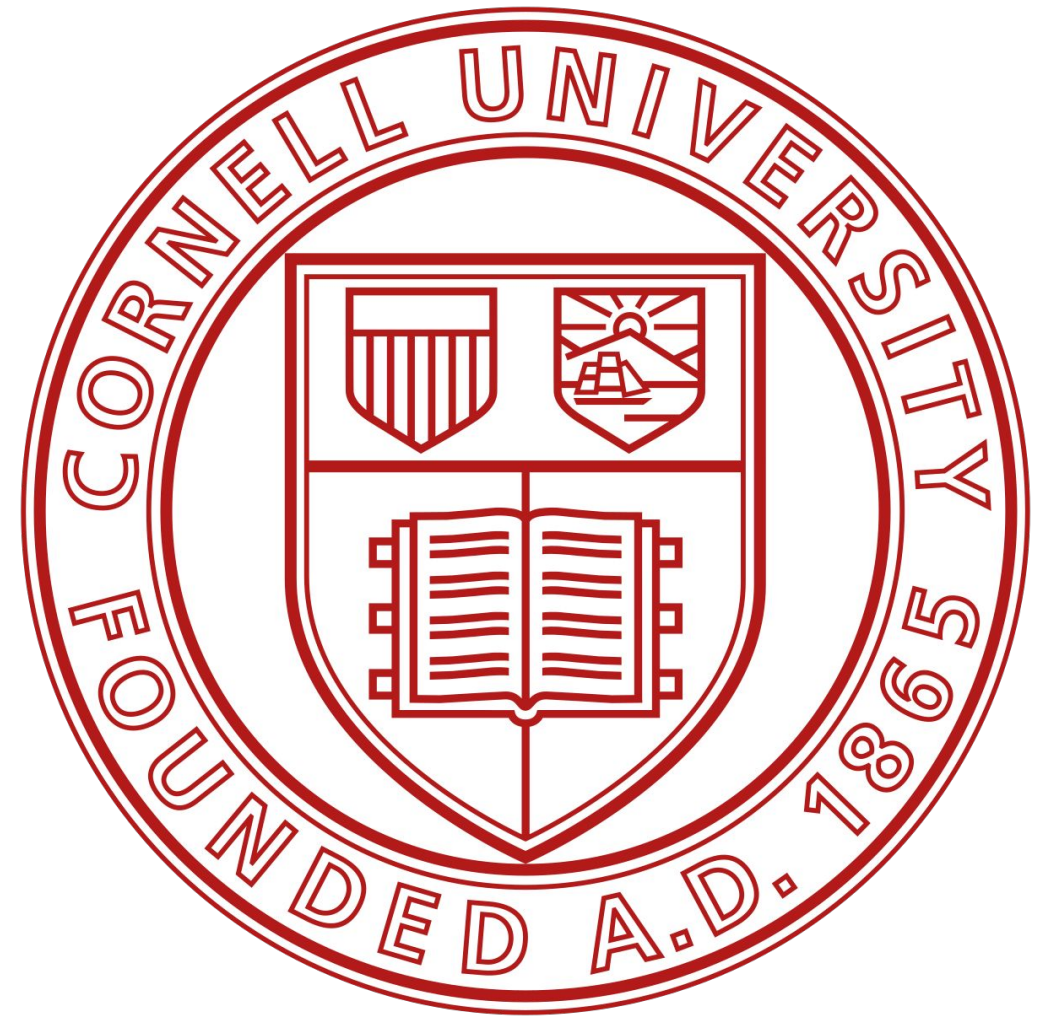
University of Chicago Library

- 2014 Launched OLE and VuFind (locally hosted)
- 2017 Task Force evaluation of LMS options:
Recommends FOLIO
 - excited by vision of FOLIO partners beyond traditional LMS
 - good cultural fit: direct access to our data; involvement in development; open source; extensible
- Jan-July 2021: Planning/prep
 - Index Data as project managers
 - Collaboration (w/Cornell, Duke, TAMU) to build ConneXion integration
- July 2021: Launch ERM, delayed full go-live
- Jan 2022 : Full go-live on Juniper (circ, acq, cat, reporting) [pending final Go/No-Go decision]
 - Index Data hosted environment
 - Catalog: still VuFind, but completely rebuilt under the hood on the latest release

THE UNIVERSITY OF
CHICAGO

Cornell University

- 2014 Adopted Blacklight, separating discovery from Voyager ILS
- 2016 Joined OLE Consortium
- 2019 Decided on July 2021 go-live
- January 2020 - FOLIO ERM go-live, local
- March 2020 - EBSCO hosting
- July 2021 - FOLIO full go-live (inc. circulation, acquisitions, cataloging, reporting) on Iris release
- December 17, 2021 - FOLIO Juniper upgrade



University of Colorado Boulder

2017

- Began contributing to FOLIO (0.5 FTE) and OLE governance

2020

- Systemwide conversations about FOLIO as Financial Futures strategy
- Financial Futures proposal approved

2021

- Decision to migrate to shared FOLIO/EDS conversation
- Signed contract with Index Data for migration

2022

- Summer 2022 full FOLIO and EDS implementation



Duke University Libraries

2008

- Launched Search TRLN powered by Endeca in 2008
- Founded Open Library Environment in 2008 through support of Andrew W. Mellon Foundation

2009 - 2016

- Hosted multiple Mellon grants supporting OLE

2016

- FOLIO launches through partnership between OLE and EBSCO
- Hosted Mellon grant to support transition

2019

- TRLN Discovery built on Blacklight Implemented

2020 - 2021

- Implemented FOLIO ERM
- Implemented FOLIO Courses and Inventory

Summer 2023

- Complete full FOLIO implementation



Michigan State University

2019

- RFP

2020

- July → Recommendation
- October → FOLIO Project Commences

2021

- July → Implement ERM, Finance, and Acquisitions
- July → Live on EDS (while running Ill Sierra)
- December → Full inventory (ca. 11 million) load

2022

- January → Upgrade to Kiwi; Full Patron Load
- February → Course Reserves
- April → Data migration dress rehearsal
- May → Upgrade to Lotus and cutover operations
- June → Live on FOLIO Cataloging and Circulation



MICHIGAN STATE

U N I V E R S I T Y

Stanford University

- ~1997 Adopted Sirsi
- 2019 - Formed internal FOLIO Steering Committee to understand fit to Stanford need
- 2020 - Active exploration of FOLIO community and software
- 2021 - Bootstrap consulting & commitment decision
- 2022 (anticipated) - migration
- 2023 Q3 (anticipated) - go live
- 2024-30 - ongoing enhancements & integrations



Stanford
University

Questions for the panel

