Flipping the Strategy
FOLIO Implementation at Five Six Research Libraries

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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
• 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
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 III 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
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
Questions for the panel