

Summary of the Chicago FOLIO retreat

June 23, 2023

1. Discussed possible causes of tensions in the community, and approaches to ease these. Perceptions vs reality and how to encourage more trust and transparency
2. Retrospective of how Data Import has been handled. Better communication would have helped. Extended inaction and loss of trust, followed by swift action resulted in community members feeling left out
3. Recognition of very large role of EBSCO in the community, and how to understand their role and participation in the community
4. Discussion of "FOLIO story" from different perspectives, a focus on what market-driven vs community-driven means, synthesis of a revised story, consideration of 5 year goals/dreams. Action - Simeon/Mike to raise for discussion in CC
5. Idea to generate a menu of items to fix/add through a community prioritization process, and how to shop to funders/vendors. Action will be to take idea to PC first (Roadmap and prioritization group)
6. Approach to generate a shared development plan/roadmap, compiled from individual plans. Funder/vendor representatives agreed to shared plans. Action will be to take idea to PC first (Roadmap and prioritization group)
7. FOLIO project has reached a certain state of maturity, project size has increased significantly so some communications structures are not working well.
8. Technical discussion following up on WOLFcon 2022 and subsequent discussions: expansion of bounded context to application, application descriptors, platform descriptors, roles/capabilities. Action is to bring conversations to TC and there will be presentations at WOLFcon 2023.
9. Discussion of developer contribution options and challenges. Approaches to better onboarding and support. Action - Mike will take to CC, Ian will start discussion of Internal Developer Platform ([IDP](#)).

Attendees

1. Tod Olson (UChicago)
2. Simeon Warner (Cornell)
3. Ian Ibbotson (k-int)
4. Kirstin Kemner-Heek (VZG Göttingen)
5. Maïke Osters (hzbz Cologne)
6. Christopher Spalding (EBSCO)
7. Gar Sydnor (EBSCO)
8. Vince Bateau (EBSCO)
9. Harry Kaplanian (EBSCO)
10. Tom Cramer (Stanford)

11. Mike Gorrell (Index Data)
12. Jakub Skoczen - VIRTUAL (Index Data)
13. Kristin Martin (UChicago)
14. Alexis Manheim (Stanford)
15. Craig McNally - VIRTUAL (EBSCO)
16. Jeremy Huff (TAMU)