



# 'Open Edge' a two day event on open source for libraries

25-26 January 2011

National e-Science Centre e-Science Institute, Edinburgh

JISC

## Speaker notes

### Day two (26 January)

#### **Ken Chad**

**CEO, Ken Chad Consulting**

Ken has over 20 years experience in the library software business and has worked with a wide range of academic, research, college, public, corporate and national libraries in the UK and throughout the world. He established Innovative Interfaces and then Endeavor Information Systems in Europe and was Executive Director and Board member at Talis where he helped to lead a major corporate, technical and cultural change programme. He set up Ken Chad Consulting in 2007. Ken has published and presented widely on open source in libraries and more widely on the strategic impact of technology-driven change.

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#### **Ken Chad Consulting Ltd (<http://www.kenchadconsulting.com>)**

We help libraries to deliver better services, reduce costs, and be more efficient through more effective and imaginative use of technology. We do this by working with individual libraries, organisations and companies with an interest in libraries. We provide flexible additional capacity and expertise in libraries, their systems and related Internet and web-based services and technologies. We have worked universities such as Manchester and the Open University and organisations such as the JISC, SCONUL and RIN.

#### **Nick Dimant & Colin Campbell (joint presentation)**

**Nick Dimant: Managing Director, PTFS Europe**

Nick is a co-founder and Managing Director, responsible for the promotion of services supporting the Evergreen and Koha library management systems and for the ArchivalWare digital library solution. He also assists with further consultancy, training and customer support. He has many years experience at director level of all aspects of the support, sale and promotion of library management systems

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#### **Colin Campbell**

**Chief Software Engineer, PTFS Europe**

Colin is Chief Software Engineer, responsible for the design, implementation and support of software developed for specific customers or for the open source community in general. He has considerable expertise in developing software for Evergreen and Koha as well as in the wider open source environment. He has a wealth of experience in the library sector.

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#### **PTFS Europe Ltd (<http://www.ptfs-europe.com/>)**

PTFS Europe provides the full range of services needed to implement and support the ArchivalWare Digital Archiving System and the Koha and Evergreen Library Management Systems

##### ArchivalWare Digital Library Solution

ArchivalWare is a web-based, full-text search and retrieval system for digital libraries. ArchivalWare helps organisations store, access, and manage digital archive collections

##### Koha Library Management System

Koha is a web-based library management system with a full suite of modules, an excellent Web 2.0 OPAC and a fast development environment, available via Software as a Service on our cloud computing platform

##### Evergreen Library Management System

Evergreen is a library management system designed specifically to support the needs of large and complex consortia

##### Implementation services

We have extensive experience of successfully implementing library management systems and digital archives. We have the track record, the skills and the expertise to ensure that a high quality project will be delivered on time and on budget

##### Support services

We already have an excellent reputation for the quality and attentiveness of the support services we provide. In turn we are backed up by the international resources of PTFS worldwide

## **Ian Dolphin,**

### **Executive Director Sakai Foundation**

Ian Dolphin became Executive Director of the Sakai Foundation in August 2010, having previously been a Board member of the Sakai Project and Foundation (2004-2008) and of Jasig (2003-2008). Ian has served as Head of eStrategy and eServices Integration at the University of Hull. He was seconded to the JISC to operate at director level within the JISC Innovation Group during 2007 and 2008-10, reviewing the JISC Information Environment work, and directing international partnership activity with agencies in Australia and New Zealand.

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#### **Sakai Foundation (<http://www.sakaiproject.org/>)**

The Sakai Foundation is a global association of Higher Education institutions and commercial organisations, with members in North America, Europe, South Africa, Japan, Australia and Latin America. The Foundation sponsors the development of the Sakai Collaboration and Learning Environment, and the next-generation Sakai Open Academic Environment. The Foundation encourages community-building between academic institutions, non-profits and commercial organizations. It provides members and others with an organisational framework within which projects related to the core academic mission areas of teaching, learning and research can flourish. The Foundation also works to promote the wider adoption of open-source and open standards approaches to software solutions within higher education.

Foundation staff coordinate software development, quality assurance and distribution activities for the community. Staff members oversee Sakai's intellectual property and track contributor agreements. They also provide technical support for both community members and potential adopters, speak at conferences and other gatherings about Sakai and manage Sakai's own conferences and meetings. The Sakai Foundation is supported by voluntary partner contributions. Sakai

Foundation member organizations elect a ten-member Board of Directors, which provide the strategic leadership for the Sakai Foundation. The Foundation is registered as a (US) based not-for-profit corporation.

## Ross Gardler

### Manager, JISC OSS watch and Vice President of Community Development, the Apache Software Foundation

Ross is a strong believer that community is more important than code, a strong community will always produce the code it needs. His work enables him to examine and understand approaches to sustainability through open development and open innovation in many different fields. Ross engages with and advises on community management in a wide range of projects from newly funded short term research and development projects, international educational and research collaborations such as Opencast Matterhorn and the Open Bioinformatics Foundation, open source spin outs from research projects such as Apache Wookie (Incubating) and Jena, software foundations such as the ASF and mixed closed/open source initiatives such as the Microsoft Biology Foundation. Ross is also chair of TransferSummit, an open innovation conference focussing on collaborative exploitation of intellectual property in software.

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### JISC OSS Watch (<http://www.oss-watch.ac.uk/>)

OSS Watch is a public (and free) service for higher and further education institutions in the UK. We help institutions and projects who are using or developing free and open source software. OSS Watch is funded by the JISC. Our offices are at the Oxford University Computing Services.

#### How can we help you?

Here are some things we can help you with:

- building new or engaging with existing development communities (for sustainability)
- software licence advice (to comply with the JISC open source policy)
- engaging with commercial companies (e.g. software procurement)
- finding routes to exploit your outputs commercially (e.g. institutional technology transfer units)
- exploring options for sustainability of software development activities
- evaluating the best software solution (either open source or proprietary, we are non-advocacy)

### The Apache Software Foundation (<http://www.apache.org/>)

Established in 1999, the all-volunteer Foundation oversees nearly one hundred fifty leading Open Source projects, including Apache HTTP Server — the world's most popular Web server software. Through the ASF's meritocratic process known as "The Apache Way," more than 300 individual Members and 2,500 Committers successfully collaborate to develop freely available enterprise-grade software, benefiting millions of users worldwide: thousands of software solutions are distributed under the Apache License; and the community actively participates in ASF mailing lists, mentoring initiatives, and ApacheCon, the Foundation's official user conference, trainings, and expo. The ASF is funded by individual donations and corporate sponsors including AMD, Basis Technology, Cloudera, Facebook, Google, IBM, HP, Matt Mullenweg, Microsoft, SpringSource, and Yahoo!

## Mark Hughes

### Head of Collections, University of Swansea.

Mark's career started as a Library Assistant at Coventry University and has since encompassed work at many different levels, mainly in the systems and service management fields, across both public and academic sectors with Swansea Public Libraries, the South West Wales Higher Education Partnership, and Swansea University. Mark moved to his current post as 'Head of Collections' at Swansea University in March 2009. His current duties include management of finance, collections and library systems. He has a significant interest in both RFID systems and Open Source technology for libraries having undertaken numerous projects in these areas in recent years.

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#### **University of Swansea (<http://www.swansea.ac.uk/>)**

The Information Systems and Services department at Swansea University is a merged entity delivering Library, Archives, ICT and Careers services to over 16,000 students and staff. The service has a significant track record on both managing technology related projects, and in working in close partnership with other institutions and other sectors as seen in projects such as the Regional Support Centre Wales, Welsh Video Network and the Virtual Academic Library partnership projects, amongst others. Library experiences with Open Source technology go back to 2007, with initial testing of VuFind, which has since replaced WebVoyage as the main public catalogue in use at Swansea University and is also used as a shared resource discovery platform with Swansea Metropolitan University and University of Wales Trinity St David as an outcome of the 'Virtual Academic Library' project. Continuing its activity in the Open Source arena, recently the library has conducted JISC projects covering both VuFind and Evergreen, and is currently involved in work on a funding bid with other Welsh libraries which will examine options around large scale shared library systems including an appraisal of open source alternatives.

#### **South West Wales Academic Partnership (<http://www.swwhep.ac.uk/>)**

The South West Wales Higher Education Partnership is a flagship collaboration project in Welsh Higher Education. Three higher education institutions (HEIs) in the South West Wales region are currently working closely together in an innovative partnership to integrate and enhance a range of services to students and staff. £7.5 million has been awarded by the Higher Education Funding Council for Wales (HEFCW) to Swansea University, Swansea Metropolitan University and University of Wales Trinity Saint David to implement change in key administrative services – under the South West Wales Higher Education Partnership (SWWHEP), Reconfiguration and Collaboration project. The project is the first of its kind in the Welsh higher education sector. Funding was approved by the Welsh Assembly Government under its "Reaching Higher" agenda to support HEIs in Wales in their attempts to improve performance, enhance competitiveness, and improve value-for-money in public services

### **John Norman**

#### **Director, Centre for Applied Research in Educational Technologies (CARET), Cambridge University**

John is also a current member and past Chair of the Sakai Foundation Board and past Chair of OSSWatch Advisory Group. His is on the JISC Learning and Teaching sub-committee and the Cambridge University Information Strategy and Services Syndicate.

John combines a passion for innovation and a commitment to open source software with his considerable industry knowledge to help facilitate University collaboration both internally and internationally. John has led CARET since 2003 following a career as an entrepreneur setting up medical devices companies in the US and across Europe.

An engineer by training, John worked in the steel and oil industries (which included a stint in the Algerian Sahara) before moving into business start ups. The most successful of these was Summit Technology Inc which went public at \$200Million after just 18 months and later sold to the Alcon division of Nestle for \$900Million. As well as his like of gadgets and new technology (you should see the cappuccino machine in the office) he is a keen sailor and once competed in the prestigious Fastnet race.

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## **Centre for Applied Research in Educational Technologies (CARET), Cambridge University**

(<http://www.caret.cam.ac.uk/>)

At CARET we design stuff that helps researchers bring their discoveries to light, and we create online learning spaces for lecturers and students. We love working with people who are ahead of the game and making their ideas come alive – it means that together we can push technology forward and then share those tools with the rest of the world. CARET also has a growing group of researchers involved in a wide variety of activities related to new technologies in higher education, ranging from needs analysis and evaluation to broader, externally funded research projects.

### Innovation

Basically we are an innovation unit focused on learning and research technologies here at the University of Cambridge. Essentially innovation is a creative process that endeavours to solve problems by exploring a range of ideas and concepts. There are no assurances of success; until discoveries are made how can we know what will work and what will fail? In a world where avoiding risk becomes an obstacle to innovation, it is important to remember that sometimes the greatest risk is to take no risk at all.

At CARET we really care about establishing a creative space where talented people can bring their ideas into being and realise the potential of their discoveries. At all stages of development we use our expertise to work out how best to take things forward, understanding that while some of our projects will become widely used successful products, others may remain thriving in their own little niches.

### Open Source

We are committed to the principals of open source software and develop robust applications. We play a leading role in many major international community source projects including Sakai, Fluid, Dspace and OpenCast. We also publish our work in accessible forms, research briefings, books and peer-reviewed research journals.

### Awards

We were given a European Schoolnet's eLearning award in 2005 for the Personal Demons project. The Plant Sciences team supported by CARET won first prize in the SAGE awards for the most outstanding "research into practice" education project in 2007.

## **Dave Parkes**

### **Associate Director Information Services University of Staffordshire**

David leads libraries as well as IT and Learning Technologies. A librarian by trade, David leads a dynamic learning support team of librarians, educational technologists, trainers, IT professionals, study skills staff and web designers to provide a broad array of quality services, resources and learning opportunities. A Fellow of the Higher Education Academy, he writes and speaks widely on library buildings, learning technologies, the provision of information and digital literacy, e-books and emerging technologies to universities, publishers, academics and other librarians. He sits on the Horizon Report Project board for 2010 and 2011, and a number of publisher advisory boards. He has recently undertaken consultancy for the Oxford University Russia Fund to help develop e-book provision in Russian universities. He is also Head of the Special Collections and Archives and chairs Inspire West Midlands – the co-operative cross-sector access scheme. He has recently edited and contributed to the Chandos book "Web 2.0 and Libraries: impacts, technologies and trends". In his spare time is a Chair of a charitable trust running a museum, walks, plays the ukulele and loves punk rock.

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**University of Staffordshire (<http://www.staffs.ac.uk/>)**

Established in 1992, Staffordshire University has evolved into one of the country's most dynamic, progressive and forward-thinking learning institutions. Always quick to adapt as student requirements change, we have become renowned for our groundbreaking new courses and first-class learning opportunities.

**Mike Taylor**

**Index data, Software Guy**

Mike works for Index Data on software for libraries, most of it open source: his official job title is Software Guy. By night, he is a palaeontologist. Among his proudest achievements are selling his first programs at the age of 13, writing the world's first Internet MUD, winning a BCS award for a plant-toxin expert system, contributing to standards in Information Retrieval and Vocabularies, creating the ZOOM-Perl module and the IRSpy web-site, contributing to the YAZ Toolkit and the SimpleServer module, garnering 95,000 hits in a single day of blogging about spaghetti puttanesca and resource locking, and naming two (so far) new dinosaurs.

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**Index Data (<http://www.indexdata.com/>)**

For more than 16 years, Index Data has built and released Open Source tools in support of networked Discovery solutions. Their customers and partners include national libraries and consortia, government agencies, and commercial companies. Their business is to seek out the most challenging problems in the area of metasearching and large-scale content indexing and searching, and to engineer industrial-strength tools to help people solve those problems. They have been active participants in and contributors to the international standards communities in their field since the founding of the company. Their open-source protocol implementations are the most widely used in the industry and have had significant impact on both the evolution and penetration of international standards like Z39.50 and SRU.

They have deep experience, and a pragmatic, result-oriented approach to software development. Their international team of software engineers bring an eclectic variety of backgrounds and interests to the table, but they all share a love of creative, innovative solutions, and of exploring the cutting edge of their domain