2021Q1 - All Community Call

FINOS Team
FINOS Project / SIG Leads
FINOS Community

Virtually held on January 27th 2021 at 3pm GMT / 10am EST
https://finos.webex.com/finos/i.php?MTID=m05a7c30c31848c6275410cf07f96a99e
Today’s Agenda

10:00 State of the FINOS Community
- FINOS community and new member update
- FINOS 2020 Q4 recap, FINOS 2021 guiding principles

10:10 Marketing and Community Engagement
- 2021 marketing and community engagement
- Open Source Fintech Meetups - Andrew King (APAC) & Claire Cocks (UK)

10:20 Community Recognition
- FINOS community spotlight and award winners
- Recruit, reward, retain FINOS contributors

10:25 FINOS Project and SIG Updates
- Morphir, Cloud Service Certification, Currency Reference Data
- Git Proxy, DevOps Mutualization, InnerSource

10:50 Community Socialization, Q&A and AOB
- Understanding the complexity of IoT within retail banking - Daniel Brookes
- AOB and Q&A

11:00 FINOS All Community Call - Close

Calls to Action

Pick a project to contribute to by EOY.

Star and join the action in the Community repo.

Write to the Community Mailing list or join FINOS office hours if you don’t know where to start!

Sign up for the FINOS Newsletter if you haven’t already.

If you are a maintainer, and need extra help, consider becoming a quarterly focus project.
State of the FINOS Community

Gabriele Columbro,
Executive Director
FINOS Community by the Numbers

**PLATINUM**
- accenture
- citi
- Goldman Sachs
- GitHub
- J.P. Morgan
- Morgan Stanley
- Nomura
- RBC
- UBS

**GOLD**
- CapitalOne
- HSBC
- IHS Markit
- Intel
- Red Hat
- Refinitiv
- SUSE
- Symphony
- Tradeweb

**SILVER**
- Adaptive
- Armory
- BNY Mellon
- Cloud9
- CloudBees
- Cosaic
- Diffblue
- Epam
- Genesis
- GitLab
- Glue42
- Itau
- Scott Logic

**ASSOCIATE**
- air
- Alliance
- InterWork
- ISDA
- Wipro

**15**
Active Open Source Projects and SIGs

**26**
Incubating Open Source Projects and SIGs

**350+**
Contributors

**37**
Corporate and Associate Members

[landscape.finos.org/](landscape.finos.org/)  [finos.org/members](finos.org/members)
Q4 was our busiest quarter ever!

The FINOS Landscape growth is accelerating...

682% increase in social (LinkedIn & Twitter) clicks
98.5% increase in social interactions
20% growth in social followers
190% growth in social shares
YouTube Channel updated with all OSSF videos, meetup and guest presentations

DevOps Mutualization
FINOS Special Interest Group

Regulation Innovation SPECIAL INTEREST GROUP
FINOS Special Interest Group

Community Spotlight recognized 4 community contributors
OSSF Awards recognized 3 contributors (evaluated over all of 2020)
Virtual Meetups Fewer in Q4 with increased focus on OSSF
FINOS Podcast 360 downloads and five stars with plans to grow in 2021

… and kept open source in financial services in the news

Press Releases promoted Open RegTech, record contributions, new members, associate membership and Legend launch
OSSF Virtual 632 registrations, 66 speakers, all content available on platform and YouTube
Awards FinTech Futures Banking Tech, Waters Technology AFTA, OpenUK Influencers
Coverage 232% increase in media coverage in 2020 over 2019 who material change in media briefings

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FINOS 2021 Guiding Principles: Focus on...

**Existing FINOS Projects**
Primary focus is on helping existing projects succeed. Less proactive outreach on bringing in new projects.
**Sample Initiatives**: Project best practices, EasyCLA, 2021 Q1 FINOS focus projects

**Existing FINOS Members**
Primary focus on supporting existing members. Reduced new member targets.
**Sample Initiatives**: Member Success; LFX Insights

**Value for the Business**
Increased FINOS team focus on initiatives that drive value for “the business”, in addition to technology teams.
**Sample Initiatives**: State of Open Source in FSI

**Surfacing Adoption**
Surface adoption of FINOS projects within banks, FinTechs, etc., in addition to measuring contribution.
**Sample Initiatives**: State of Open Source in FSI, LFX Insights

**Scalable Project Enablement**
Deliver project “self-serve” tools/materials, and introduce new project coordination options.
**Sample Initiatives**: Project funding, FINOS project coordinators

**Value (& motivation) for Individuals**
Increased focus on the value of OSS for individuals in addition to the corporate value proposition.
**Sample Initiatives**: Recruit, reward, retain

**Value for FinTechs & Regulators**
Additional focus showing value to fintechs and regulators in addition to FSIs.
**Sample Initiatives**: Open RegTech, FINOS Labs
**Call to action:** If you encounter internal resistance / issues, let us know.

- **SUSTAIN**
  - Incentivize Individuals
  - Drive internal adoption
  - Strategic commitment to FINOS OSS projects

- **ADVOCATE**
  - FINOS / Open Source Internally / Externally
  - For Diversity

- **FOUNDATIONAL**
  - LFX
  - CRM and backend services
  - Legal and C/A

- **EMPOWER**
  - Open Source Readiness
  - Neutral venue
  - Compliant OSS toolchain
  - IP Management

- **SUPPORT**
  - Infrastructure
  - Coaching & Advisory
  - Initial setup
  - Focus projects

- **PROMOTE**
  - Marketing channels
  - Events
  - Awards
  - Incentives / rewards

- **ORGANIZE**
  - Project coordination
  - Project ownership
  - Day-to-day Operations

- **MAINTAIN**
  - Development
  - Release
  - Manage inbound contributions

- **GROW**
  - Leadership
  - Governance
  - Advocacy

- **UPSTREAM**
  - Projects
  - ESG / OS-Climate
  - Hyperledger / CNCF SIGs

- **VALUE ADD SERVICES**
  - Training Mutualization
  - Membership meetings
  - Legal Summit
  - Research (coming!)

**Board**

**Community**

**Linux Foundation**

**FINOS**
- Fintech Open Source Foundation
- finos.org

FINOS will resource to support project coordination. Is any great candidate? 😊
Marketing and Community Engagement

Tosha Ellison,
Chief Operating Officer
2021 Marketing and Community Engagement

- Recruit, Reward and Retain FINOS Contributors
  - Training, recognition, swag and employer engagement
- FINOS Events and Meetups
  - FINOS hosted meetups (email marketing@finos.org with ideas)
  - Events organised with the Linux Foundation, including virtual, hybrid & in person
  - Meetups scaled through members / partners, regional events, virtual & in person
- FINOS Podcasts
  - Expanding formats, federate and do more!
- Tech Sprints, Innovation Projects & Onsite Bootcamps
- Scale and nurture project self-sufficiency

Open Source Fintech Meetups Updates
- Welcome **Andrew King**, APAC meetup (Virtual), Suite2Go
- **Claire Cocks**, UK meetups (Virtual, London, Edinburgh, Bristol), Scott Logic
Open Source in Fintech Event Series
UK Meetup collaboration
Scott Logic/FINOS
Our history and plans for the future.
Get involved

Next event, 11 Feb @ 4pm GMT / 11am EST


Edinburgh: [https://bitly.com/eosfm](https://bitly.com/eosfm)


ccock@scottlogic.com
Community Recognition

James McLeod,
Director of Community
FINOS Community Spotlight and Award Winners

Well Done FINOS Community

Congratulations to our OSSE 2020 Community Award Winners and to those featured in the Community Spotlight.

Raise Community Recognition

Raise a FINOS Community Recognition to highlight the positive contributions of a member of the FINOS open source community.
OSS Contributors recruited to FINOS through GitHub activity, blog posts, articles, training sessions, external talks, regional meetups, podcasts and hackathons.

Recruited Contributors can become inactive over time for a number of reasons, including moving from firm, low project activity, limited recognition or limited work opportunity.

New Contributor Event
FINOS & Lead Maintainers notified of new contributor for personalized welcome, project onboarding and sending low cost swag.

Inactive Contributors
FINOS Contributors can become inactive over time for a number of reasons, including moving from firm, low project activity, limited recognition or limited work opportunity.

Inactive Contributor Event
FINOS & Lead Maintainers notified when contributors become inactive in order to unblock and help resolve potential contribution blockers.

Contributor Inactive Event
FINOS notified when contributor leaves the project / FINOS for personalized email and meeting.

Recognition & Reward
As FINOS Contributors progress within the foundation, their maturity and experience is rewarded over time through FINOS All Community, FINOS Community Spotlight, OSSF Community Awards, Maintainer Recognition and FINOS swag.

Recognition and Reward
A personalized ‘Welcome Back’ email is sent to a contributor when they return to a project after leaving for an extended period of time.

Contributor Welcome Back Event
FINOS notified when contributor leaves the project / FINOS for personalized email and meeting.

Contributor Left Event
FINOS Project and SIG Updates

FINOS Team and the FINOS Community
**What is Morphir?**

Morphir is a multi-language system built on a data format that captures an application's domain model and business logic in a technology agnostic manner. Read more on the [Morphir Documentation Microsite](https://github.com/finos/morphir).

**Morphir Contribution Opportunities:**

- We anticipate applicability to the FINOS Legend and FinReg initiatives.

Explore Morphir GitHub issues to collaborate and engage in current and future project requirements - [https://github.com/finos/morphir/issues](https://github.com/finos/morphir/issues)
Cloud Service Certification

Find Cloud Service Certification in the FINOS organisation on GitHub https://github.com/finos/cloud-service-certification

Google Cloud Platform GKE Journey Update

- GKE Service Accelerator Template contributed by Alfred Tommy
- Terraform IaC contributed following GKE Service Accelerator Template
- Lee Faus and Eddie Knight formed BDD team to complete GKE journey
- CSC epic created to explore Functional and Declarative BDD Testing

BDD Investigation and Next Steps

- Open Policy Agent spiked and demonstrated for IaC pre-deployment verification
- Probr OSS project demonstrated for post-deployment validation of security standards
- Lee and Eddie engaging with Alfred to engage GKE BDD requirements

Explore Cloud Service Certification issues to engage with project meetings and requirements - https://github.com/finos/cloud-service-certification/issues
Currency Reference Data

Using **Legend Studio** to create a **standard currency object** and a central cloud based repository using **ISO Currency Code data** as a baseline.

**Get involved!**
- Read about CurRef Data in [GitHub](https://github.com)
- Request an account at [finos.org/legend](https://finos.org/legend) and check out the current [model](https://modelFinos.org/legend)
- Join the [next meeting](https://finos.org/legend) (February 9th @ 10am ET / 3pm GMT)

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For more information see the Currency Reference Data Roadmap.
Git Proxy

Q4 Achievements

- Code is contributed to FINOS on [github.com/finos/git-proxy](https://github.com/finos/git-proxy)
- 255 commits, 23 Pull Requests, 4 collaborators
- Great progresses towards MVP
  - Active Directory authentication
  - MongoDB persistence support
  - Improved UI

Next Steps

- **Git Proxy 2021 Kickoff call Thursday 28th (9am EST / 2pm GMT)** - Find call details on the [FINOS Project Calendar](https://finos.org)
- **Presenting at Open Source Readiness** on Wednesday 3rd February at 10am EST
- **Complete the MVP**
- Gather more project participants
- Gather more banks to run the MVP (behind their corporate firewall)

Help needed

- **Node backend developers**, building services and controls, dealing with persistence and git protocol payloads
- **React developers**, delivering features to end users
- **Early users**, updating existing documentation and building more
DevOps Mutualization

- DevOps Mutualization was contributed to FINOS in Q4 2020 and is found on GitHub
  - https://github.com/finos/devops-mutualization
- SIG Lead: Amol Shukla (Morgan Stanley); Secretary: Anders Wallgren (CloudBees)
- DevOps adoption in banking is accelerated by collaborating and sharing approaches
- Goals
  - Develop common understanding of DevOps through practices, tooling and projects
  - Influence DevOps, Cloud, and Ecosystem vendors
  - Document common approaches for compliance and assurance across banks
- Objectives
  - How are banks orchestrating DevOps to create existing self-service workflows?
  - The different types of SDLC evidence that needs to be produced and stored
- Get Involved
  - Join the next SIG call and engage the SIG through our GitHub issues
    - https://github.com/finos/devops-mutualization/issues
  - Email devops-mutualization+subscribe@finos.org to join our mailing list
InnerSource SIG - Approved Jan 20th

- SIG Goals:
  - Create a safe space to identify and share challenges and solutions that accelerate regulated enterprises’ efforts to implement InnerSource within their organisations.
  - Collaborate with the broader FINOS community to share outputs.
  - Work with InnerSource Commons by sharing relevant outputs upstream to the broader ISC community.

- SIG Leadership Team includes: Daniela Zheleva, DB (Co-lead); Arthur Maltson, Capital One (Co-lead); Clare Dillon, InnerSource Commons (Secretary); Aaron Searle, Morgan Stanley; Anthony Vacca, RBC; Danese Cooper, InnerSource Commons.

- Next Steps:
  - Form SIG; Set-up SIG operations
  - Continue collaboration with Open Source Readiness Group

Follow our progress & help spread the word: https://github.com/finos/community/issues/84
Community Socialization

Daniel Brookes, Intel Partner and Alliances Manager

IoT and EdgeX for Retail Banking

FINOS Community Issue #98

Understanding the complexity of IoT within the retail bank environment.
Q&A and AOB

Finally ...

- Watch the FINOS Community Repository
- Raise a FINOS Community Recognition
- Find a Project / SIG on the FINOS Landscape
- Join a FINOS Project Meeting