Q2 FINOS All Community Call

Thursday May 2, 2024
Today’s Agenda

- **Welcome** - Karl Moll, FINOS (15 minutes)
  - Intro to the Community - Jane Gavronsky, FINOS
  - New Board Announcement - Sitija Sarkar, Blackrock
  - OSFF updates - Grizz Griswold, FINOS

- **SIG and Community Updates:** (40 minutes)
  - Artificial Intelligence (AI) Readiness SIG - Colin Eberhardt, Scott Logic
  - DEI - Rita Chaturvedi, Morgan Stanley
  - Open Source Readiness (OSR) - Brittany Istenes, Fannie Mae
  - Zenith - Peter Smulovics, Morgan Stanley
  - Accessibility Theme Builder - Lise Noble, Discover
  - Spring Bot - Rob Moffat, FINOS

- **Calls-to-Action** (5 minutes)
  - FINOS Ambassador Program - Grizz Griswold, FINOS
  - FINOS Sandbox - Karl Moll, FINOS

- **Final Announcements** - Kendall Perez, FINOS
- **Q&A**

Please Note:

This event, and all FINOS events adhere to the FINOS / Linux Foundation Code of Conduct
Welcome the newest member of the FINOS team, Eva Columbro
Intro to the Community

Jane Gavronsky, FINOS
A Q1-2024 Snapshot

We saw our community come together like never before. FINOS is now recognized as “the” industry venue for open innovation.
New Board Announcement

Sitija Sarkar, Blackrock
Welcome New FINOS Board Member

New Gold Representative

Sitija Sarkar
Technical Fellow & Managing Director

BlackRock
OSFF ‘24

Grizz Griswold, FINOS
FINOS Open Source in Finance Forum

The countdown is on for OSFF London on June 26th!

LONDON, JUNE 26 @ PARK PLAZA WESTMINSTER BRIDGE

VIEW THE FULL AGENDA

Sponsor / Register now!
SIG & Community Updates
Artificial Intelligence (AI) Readiness SIG

Colin Eberhardt, Scott Logic
The challenge

- Generative AI is expected to be a transformative force in 2024.
- The FSI has a unique set of challenges that make it a challenge to adopt.
- Existing AI model management approaches don’t provide the flexibility we need.
- To unlock the true potential, we need to put it in the hands of everyone (safely).

The solution

- AI Readiness SIG, similar to OSR.
- Members-only group - details on GitHub [https://github.com/finos/ai-readiness](https://github.com/finos/ai-readiness).
- Our goal is to mutually develop a governance framework that manages the on-boarding, development of, and running AI-based solutions within financial services organisations.
- We will focus on a subset of the problem, leverage existing frameworks, apply threat modelling.

Next steps

- SIG approved by the board and currently forming. [Register your interest here](https://github.com/finos/ai-readiness).
- Regular meetings have been planned.
- A core team is under formation.
- An in-person workshop planned in London, we'll likely hold similar meetings at OSFF.
- Members - contact membersuccess@finos.org to be added to the meetings and activities.
- Non-members are invited to join FINOS to participate in the formation stage.
Diversity, Equity & Inclusion (DEI) SIG

Rita Chaturvedi, Morgan Stanley
What is FINOS DEI SIG?

🚀 Kicked off in 2022, the DEI Special Interest Group brings together OS Contributors committed to building a diverse talent pool that changes the status quo and drives a better future in Financial Services Open Source and beyond.

Why do we need the DEI SIG?

In order for FS OS to achieve its full impact around digital transformation, FINOS’ members need to advance and drive forward best practices to attract, grow and retain an inclusive OS talent pool. Study after study demonstrates that an inclusive open source community of contributors produces better outcomes, more robust customer-focused products and competitive advantage for DEI trailblazers. We have the opportunity to make it part of our DNA and legacy.

The work of the DEI committee will complement FINOS’ OSR SIG including training and certification efforts to create a powerful FINOS platform for collaboration to drive impact for our members around DEI including:

- Developing, advancing and retaining diverse talent
- Ensuring FINOS projects are inclusive & our events are diverse

What are our goals?

- FINOS representation at key Industry events
- Supporting the FINOS Ambassador programme activities & federated & partner events
- Scholarships support for underrepresented groups, students and needs-based individuals in the fintech community
- Collaborating with FINOS Projects including the FINOS Accessibility Project to drive inclusivity
- Engaging FINOS’ Member DEI experts to guide our work and deepen impact around: a best practices toolkit, metrics selection, and open source talent development
- Developing a dedicated microsite

How to Get Involved

- Attend DEI SIG meetings found on our calendar
- Reach out to diversity-inclusion-committee@finos.org

Supported by Exec Sponsors Citi & BMO.
Upcoming Programs

- **FINOS A11y Theme Builder Collaboration Summit**, hosted by Discover, on Global Accessibility Awareness Day | May 16 | Chicago and Virtual
  - Registration is open - please share! [https://bit.ly/4aT1C76](https://bit.ly/4aT1C76)
- **FINOS Open Source in Finance Meetup - DEI SIG Edition**, hosted by FINOS Ambassador Paula Paul Wellington Management | May 21 | Boston
- **DEI SIG hosting ‘Addressing Bias in Software Engineering’** June 26 | OSFF London
- **Grace Hopper Celebration (GHC) | October 8 - 11 | Philadelphia**
  - 🚀 Proposal on ‘Addressing Bias in Software Engineering in the Age of AI’ accepted 🚀
  - Open Source Day programme in development

Call To Action

- Develop FINOS Ambassador event series for DEI
- **GHC** - Calling all member organizations with offices in Philadelphia to host our local DEI event in collaboration with the largest conference for diversity in tech, the Grace Hopper Celebration on Monday, October 7th, just prior to opening ceremonies for GHC 2024 - format to be decided.
  - We also seek members to host FINOS at their booth to drive awareness & engagement
- Calling all interested in helping the FINOS DEI SIG create impact!
  - Join us on a SIG call
  - Engage your company’s DEI experts to guide our work
  - Pick up a task from our [GitHub planning & volunteer opportunities](https://github.com/finos/DEI-SIG) (e.g. Upskilling & Reskilling; Metrics; etc.
  - Add your voice TODAY to advance a more inclusive industry!

How to Get Involved

- Attend DEI SIG meetings found on our calendar
- Reach out to diversity-inclusion-committee@finos.org

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Open Source Readiness (OSR)

Brittany Istenes, Fannie Mae
Strategic Initiative: Open Source Readiness

FINOS Lead
Rob Moffat

Description
Through the Open Source Readiness (OSR) Initiative, FINOS promotes collaboration on Special Interest Groups (SIGs) and Projects, to develop tools and policies aimed at accelerating open source maturity for financial services firms.

Why Get Involved in 2024
This year the Open Source Readiness SIG is focused on bringing in external speakers and building our community. We will be creating numerous new blog posts on the importance of open source readiness in financial institutions and advocating for the numerous trainings we have available. We also have released a downloadable maturity model for groups to self-assess their current open source maturity.

How to Get Involved
Attend the OSR working group meetings found on our calendar
Zenith SIG

Peter Smulovics, Morgan Stanley
Zenith SIG

What is Zenith?
At Zenith, we believe in the power of collaboration to shape the future of finance. As an industry-wide effort led by FINOS, we are committed to understanding, defining, and building standards that adapt to emerging technologies.

Latest News
We have kicked off our Web3 & DLT Sandbox with Hedera & Swirldslabs. You can find out more at zenith.finosis.org

We are looking for FINOS member sponsors for two of our projects. Please get in touch at zenith-leadership@lists.finos.org

We welcome any and all contributions to our repo!

Calling all Fintech Innovators
Join us for monthly SIG meetings where we discuss emerging technology & set out our new targets. Every fourth Thursday of the month at 10am EST

Together, Let’s re-define Finance with Open-Source Innovation!
Accessibility Theme Builder

Lise Noble, Discover Financial Services
This week FINOS launched their Accessibility Theme Builder Mentorship Program, sponsored by Discover® Financial Services.

Applications are now open for individuals passionate about accessible design and with expertise in JavaScript, Node.js, and React.

You will have the opportunity to collaborate with industry experts, build your portfolio, get paid for your contributions, and make a meaningful impact on accessibility.

Learn more & apply now
Accessibility Theme Builder
Upcoming Events and Opportunities

FINOS A11y Theme Builder Collaboration Summit hosted by Discover® Financial Services
May 16 | Global Accessibility Awareness Day | Chicago and Virtual
Registration is open - please share!
https://technology.discover.com/events/2024-a11y-themebuilder-collaboration-summit

New Linux Foundation badges for Theme Builder community champions and contributors!
May 16 | Global Accessibility Awareness Day | Chicago and Virtual
Launching at the Collaboration Summit on Global Accessibility Awareness Day

Theme Builder presentations at OSFF London on June 26th and in development for OSFF New York

Oct 4 | Grace Hopper Celebration Open Source Day | Virtual
Program in development featuring the Accessibility Theme Builder
Spring Bot

Rob Moffat, FINOS
Spring Bot: Deutsche Bank Case Study is live!

Spring Bot helps Deutsche Bank rapidly develop bots that process over 80,000 internal messages daily.

- DB developed a framework that engineers from 30+ teams across the bank use to deliver new bots used in front, middle, and back office.
- The framework addresses the hurdles that make integrating with MS Teams Difficult, enabling engineers to develop apps/bots/connectors using a straightforward RestAPI with integration connectors for one-way and two-way communication.
- They are looking for external contributors to extend the framework for chat systems beyond MS Teams and Symphony.

Don’t reinvent the wheel, use this framework!

LEARN MORE AND GET INVOLVED

Read the Case Study
Check the calendar and join a project meeting
Watch (star) the project
Calls-to-Action
FINOS Ambassador Program

Grizz Griswold, FINOS
Current FINOS Ambassadors

Olivier Poupeney
Head Ambassador
Head of Developer Relations
Orkes

Cody Zuschlag
Senior Developer Relations Engineer
Nearform

Brett Haymaker
Senior UI/UX Engineer
Grandview Analytics

Brittany Erica Istenes
OSPO Strategist
Fannie Mae

Eddie Knight
OSPO Technical Program Manager
Sonatype

Mike Minett
Growth Partner
turntable.io

Sam Moorhouse
Founder & CEO
turntable.io

Paula Paul
Distinguished Engineer and CTO
Greystone Associates

Peter Smulovics
Executive Director
Morgan Stanley

Learn more & Sign up here

Join our next meetup on May 21st in Boston - hosted by Paula Paul & sponsored by Wellington
FINOS Sandbox

Karl Moll, FINOS
FINOS Project Sandbox

Benefits

For adopters: it shows the art of the possible of FINOS projects.

For project maintainers and contributors: it lowers barriers to participation and helps projects scale, providing a venue for consumers and contributors to engage.

What is the FINOS Project Sandbox?

The FINOS Sandbox allows FINOS open source projects to host a public runtime environment to serve different purposes, like enabling easy evaluation, public collaboration or delivering real life demo environments. The FINOS technology team provides infrastructure and operational support to project maintainers, enabling them to focus on development rather than operations.

Propose a Project for Inclusion

All contributors to FINOS projects that are affiliated with a FINOS Member can request to be included in the FINOS Project Sandbox by emailing help@finos.org.
Final Announcements

Kendall Perez, FINOS
Save the dates

**Upcoming Elections**

- **June 26, 2024**
  - OSFF London
  - Sponsor & Register

- **June 2024**
  - Technical Oversight Committee (TOC) Election
  - 5 community-selected TOC member seats will be up for election

- **Sept 30 - Oct 1, 2024**
  - OSFF NYC
  - Sponsor / Submit Speakers & Keynotes

- **November 2024**
  - Gold Representative Election

- **May 9, 2024**
  - Rise Presents: Regulating AI (NYC)
  - Andrew Aitken (Hedera), Aric Rosenbaum (Red Hat), John Mark Walker (Fannie Mae) terms expires January 2025

**Events**

- **Rise Presents: Regulating AI (NYC)**
  - Rise by Barclays & Women in RegTech New York - [sign up here](#)
Thank you!