

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



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Intro to the Community



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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.



Discover Financial Services

181,763 followers
15h · 🌐

Discover is excited to partner with **FINOS** on a paid mentorship program for Accessibility Theme Builder, Discover's first open source project which was recently donated back to the open source community. To learn more about the project, read the blog post from Distinguished Engineer **Lise Noble** here: <https://bit.ly/4bg3VAM>

To apply for the Accessibility Theme Builder Mentorship, visit: <https://bit.ly/4a6BsMO>



FINOS

5,837 followers
1w · Edited · 🌐

We're delighted to announce the launch of the Accessibility Theme Builder mentorship program, sponsored by **Discover Financial Services** & hosted by FINOS. Apply now! 📄 <https://bit.ly/3Ua16uh>

Applications are now open for paid mentee positions with expertise in JavaScript, Node.js, and React.

📄 Learn more about the FINOS Accessibility Theme Builder in our newest blog post from **Lise Noble**, Director/Distinguished UX Engineer & Designer at Discover. <https://bit.ly/3Qgfb0g>

#FINOS #opensource #fintech #financialservices #accessibility #mentors



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FINOS Accessibility Theme Builder Mentorship

APPLY NOW

Current FINOS Ambassadors



Oliver Poupenev

Head Ambassador
Head of Developer Relations
@Okin



Cody Zuschlag
Senior Developer Relations
Engineer
@codyz



Brett Haymaker
Senior UX/UI Engineer
@brett_haymaker



Brittany Erica Istenes
DSPO Strategist
@BrittanyIstenes



Eddie Knight
OSPO Technical Program
Manager
@eddieknight



Mike Minett
Growth Partner
@mike_minett



Sam Moorhouse
Founder & CEO
@sammoorhouse



Paula Paul
Distinguished Engineer and
CTO
@PaulaPaul



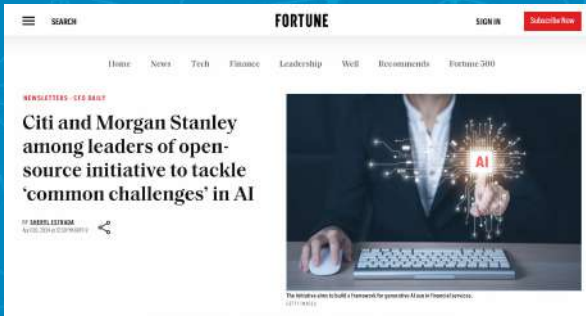
Peter Smulovics
Executive Director
@peter_smulovics

FINOS PRESS RELEASE

FINOS Welcomes Six Industry Leaders As New Members, To Enhance Buy-Side Connectivity, Cloud and Supply Chain Security Initiatives



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FINOS BLOG POST

CDM Code Generator Workshop Proves a Success



Chris Rayner
Senior Associate -
Market Infrastructure
& Technology, ISLA



Minesh Patel
Chief Technology
Officer, REGnosys

CDM | COMMON DOMAIN MODEL

FINOS BLOG POST

Announcing the FINOS Project Sandbox: A Collaborative Playground for Open Finance Innovation



Maurizio Pillitu
Chief Technology
Officer
@FINOS

New Board Announcement

Sitija Sarkar, Blackrock



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Welcome New FINOS Board Member



New Gold Representative

Sitija Sarkar

Technical Fellow & Managing
Director

BlackRock

OSFF '24



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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!**



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SIG & Community Updates



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Artificial Intelligence (AI) Readiness SIG



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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>
- 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.](#)
- 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



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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



SCAN ME


Fintech Open Source Foundation



Supported by Exec Sponsors Citi & BMO.

finos.org

Upcoming Programs

- **FINOS AIly 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> 
- 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 'c **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](#) (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



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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



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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.finos.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!

How to get involved:

Join the Mailgroup & attend the sessions



Accessibility Theme Builder



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Lise Noble, Discover Financial Services



Accessibility Theme Builder Mentorship Program

- 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](#)



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



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Rob Moffat, FINOS

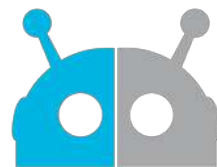


Spring Bot: Deutsche Bank Case Study is live!

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!



SPRINGBOT

LEARN MORE AND GET INVOLVED

[Read the Case Study](#)

[Check the calendar](#) and join a project meeting

[Watch \(star\) the project](#)

Calls-to-Action



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FINOS Ambassador Program



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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
turntabl.io



Sam Moorhouse
Founder & CEO
turntabl.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



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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.

In the FINOS Sandbox



SCAN ME



TraderX

LEGEND



WALTZ



CDM

COMMON DOMAIN MODEL

OPEN
REG
TECH

US LCR

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



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Kendall Perez, FINOS



Save the dates

Upcoming Elections

Events

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

Andrew Aitken (Hedera), Aric Rosenbaum (Red Hat), John Mark
Walker (Fannie Mae) terms expires January 2025

May 9, 2024

Rise Presents: Regulating AI
(NYC)

Rise by Barclays & Women in RegTech New York -
[sign up here](#)



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Q&A





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Thank you!

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