Open Source Readiness Program Update

FINOS Member's Meeting June 26th, 2018

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Overview

The Open Source Readiness program aims to provide a staged approach to deeper open source engagement, producing documentation, training, and tools for firms of every stage of open source readiness. Specifically, the Program is focused on:

- Policy & Process: legal and procedural frameworks to support compliant open source development by financial services firms.
- Tooling & Technology: projects to develop software and infrastructure to ease compliant collaboration between financial services firms.
- Awareness: training, workshops, one-on-one consultations, and informational materials to help members learn how to get value out of open source collaboration.



OSR

Governance

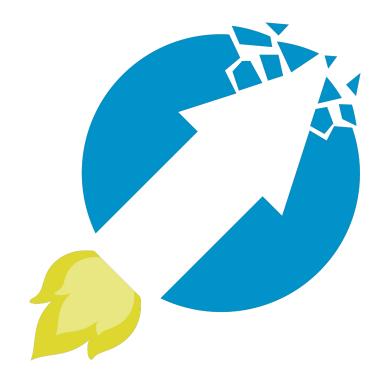
Standard POP

The road to Open Source Readiness

Strategic **Open Source Standardized** Readiness **Tracked** Consumption and Assessment Managed Contribution **Tracked** helps you Consumption and identify **Tracked** All level of Contribution **Tracked** contributions where you Ad Hoc consumption **Tracked** including are on the consumption managing own Ad Hoc contributions Minor open source Consumption Small proprietary maturity contribution No Contribution software contributions scale. **No Contribution** Contribute Consume Lead **Benefits & Business Open Source** OSS Decision-maker OSS Readiness **OSS events & basic Awareness (People)** Value of OSS **Engagement** Councils Whitepaper **Strategies** FinServ OSS program Open source license How to set up OSS **Reference FOSS Open source project Policy (Process)** office knowledge policy for FinServ guidance **Program Office** governance guidance sharing Compliant **Continuous IP** Surveillance solutions Compliant OSS **Programs Community Technology (Tools)** infrastructure for compliance / security for open source engagement **Self-Promotion tools FINOS projects** validation tools infrastructure engagement

Activity

- Published a Reference FOSS Policy for Financial Services Firms to use as a template for a comprehensive policy.
- Proof-of-concept GitHub ChatOps Bot to allow surveilled interactions with GitHub issues.
- White paper: Benefits & Business Value of Open Source for Financial Services (in process)—in collaboration with Red Hat & Wipro.



OSR & Member Success

OSR Enablement Informs **Program Priorities** Content Success criteria FinServ compliant (everyone's ready) **OSS** toolchain Member Contribution **OSS Policies and** opportunities **Processes** Success **Initiative**

How to Get Involved

- Evaluate the Reference FOSS Policy with decision-makers at your company and adopt or adapt it.
- Engage with Member Success to evaluate your readiness & needs.
- Tell us what to do next:
 - More policy or educational materials?
 - Working group for knowledge-sharing between firms?
 - Members-only training on open source strategy, compliance, process, or other topics?



OpenSource Readiness

Thank you!

Get in touch with OSR

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