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.
The road to Open Source Readiness

Open Source Readiness Assessment helps you identify where you are on the maturity scale.

**Ad Hoc**
- Tracked consumption
- No Contribution

**Tracked**
- Tracked consumption
- Minor contribution

**Managed**
- Tracked consumption
- Minor contributions
- Small proprietary contributions

**Standardized**
- Tracked Consumption and Contribution
- All level of contributions including managing own open source software

**Strategic**
- Tracked Consumption and Contribution
- All level of contributions including managing own open source software

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**Consume**
- OSS Readiness Assessment
- OSS events & basic trainings
- Benefits & Business Value of OSS Whitepaper
- Open Source Engagement Strategies
- OSS Decision-maker Councils

**Contribute**
- Reference FOSS policy for FinServ
- Open source license guidance
- How to set up OSS Program Office
- FinServ OSS program office knowledge sharing
- Open source project governance guidance

**Lead**
- Continuous IP compliance / security validation tools
- Surveillance solutions for open source engagement
- Compliant OSS engagement Infrastructure
- Programs Community Self-Promotion tools

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**Awareness (People)**
- OSS Readiness Assessment
- OSS events & basic trainings
- Benefits & Business Value of OSS Whitepaper
- Open Source Engagement Strategies
- OSS Decision-maker Councils

**Policy (Process)**
- Reference FOSS policy for FinServ
- Open source license guidance
- How to set up OSS Program Office
- FinServ OSS program office knowledge sharing
- Open source project governance guidance

**Technology (Tools)**
- Continuous IP compliance / security validation tools
- Surveillance solutions for open source engagement
- Compliant OSS engagement Infrastructure
- Programs Community Self-Promotion tools

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FINOS Fintech Open Source Foundation
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.
OSR & Member Success

Informs Priorities

Success criteria (everyone’s ready)

Contribution opportunities

OSR Program

Enablement Content

FinServ compliant OSS toolchain

OSS Policies and Processes

Member 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?
Thank you!

Get in touch with OSR

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