FOLIO Meetups

This document describes the process for organizing and running a FOLIO Day and includes the process for organizing the event, a timeline, sample text for event description, invitations and other emails and a sample agenda. Contact Rachel Fadlon, FOLIO Community Outreach, EBSCO, for help with event logistics, acquiring speakers, registration page, creating and sending email and collateral requests and any other issues. Rachel can also assist in creating successful agendas and offer feedback on what has worked (and not worked) at past FOLIO meetups.

Process for Organizing

1. Identify a host organization and determine who is covering costs
2. Identify a contact person at the organization
3. Choose a date
4. Find out the venue/room specifics – Needed for registration setup
   a. Room name / location
   b. Room capacity based on room setup
   c. AV included? If so, what is the setup?
5. If the meetup is tied to a conference and a meeting room is being requested
   a. The following conferences require contacting the Conferences Manager
      i. ALA, ALAMW, ER&L, Charleston, ACRL – Kate Waldron
      ii. PLA, AASL, OLA – Amy O'Keeffe
      iii. Additional conferences where we would book outside of the conference management team
         1. Code4Lib, Access Canada – Rachel Fadlon
         2. For conferences outside of the US, please contact Rachel Fadlon
6. Agree on agenda
7. Enlist speakers
   a. Librarians
   b. Developers
   c. Vendors
8. Get bios of speakers
9. Create a written description of the event
10. Create an event registration page (Eventbrite)
    a. Need to send the following information to Rachel:
       i. Event Title
       ii. Location – Venue, address, room location and room name
       iii. Start Time / End Time / Time Zone
       iv. Event Description
       v. Organizer Name – if applicable / Organizer Description – if applicable
       vi. Tickets – When tickets should be available – when should tickets close - # of tickets – number of tickets should be based on room capacity and room setup
       vii. Message for order confirmation page:
          1. e.g., Thanks for registering. Don't forget to keep your tickets handy, either in the Eventbrite app or print them out and bring them with you.

        viii.   Customize Email

1. Tell your attendees what they should bring to the event, and include information about your refund policy. If you're hosting an online event, you can provide webinar instructions in this section.

11. Provide Rachel Fadlon with messaging information for the event:
    a. Organizational Twitter handle
    b. Individuals' Twitter handles (who want to be mentioned)
    c. Event hashtag: #FOLIODays, #FOLIO_Location
12. Send out a save the date
    a. FOLIO has an email system. Please coordinate with Rachel, who can help with sending out all email communications.
13. Coordinate event logistics
    a. Room Set-up – Send requests if allowed (see below)
    b. AV requirements
        i. Standard – Screen, projector, projector stand – if small meet-ups, no sound required
    c. Food reservations – Who is the onsite contact? Order basics, coffee and light refreshments for AM, sandwich buffet for lunch, coffee and light refreshments for PM
    d. Giveaways/collateral – Find out if any different type of item is needed – Post-Its, Sharpies, Flyers, Pens, Stickers, Banner stand
        i. Available FOLIO materials include: FOLIO pens, stickers, flyers
            1. International requests for materials need to be made at least 3 weeks in advance of the event
            2. Requests for events in the US should be made at least 2 weeks in advance of the event
14. Send out invitation
15. Pull guest list on a bi-weekly then weekly basis, send to those who are participating in the meet-up
16. Send out reminder email – with more details
17. Send out last reminder email with full schedule
18. Ship out items – note timeline below for appropriate timeframes
19. Send final guest list
20. Identify who will take photos and post to social media during event (using hashtags)
    a. Send photos to kathleen@folio.org
21. Hold event
22. Send out thank you email – add attendees to FOLIO newsletter list
23. Send list of people who attended
24. Send a summary of the event for use in newsletters, action items for follow up, and ideas and feedback from the event

Recommended Timeline

Month	Week	Tasks
3 months before event		Identify a host organization and determine who is covering costs Identify a contact person at the organization Choose a date Send Email #1 - save the date
2 months before event		Find out the venue/room specifics Confirm agenda Enlist speakers Get bios of speakers Create a written description of the event Provide Rachel Fadlon with messaging information for the event Create an event registration page Get a biweeky report on registered attendees from Rachel Send Email #2 - highlighting speakers
1 month before event		Coordinate event logistics: room setup, AV requirments, food reservations, supplies and collateral Get a weekly report on registered attendees from Rachel
	3 weeks before	For international events: send request for materials
	2 weeks before	For events in North America: send requests for materials
	1 week before	Identify who will take photos and post to social media during event and notify Rachel Send Email #3 - event reminder
Event	Event	Take photos Send photos to kathleen@FOLIO.org
	1 week after	Send Email #4 - thank you Send list of people who attended to rachel@folio.com Send a summary of the event for use in newsletters, action items for follow up, and ideas and feedback from the event to rachel@FOLIO.org

# Meeting Room Set-ups and Styles

Auditorium Style Appropriate for short lecture or larger groups that do not require extensive note-taking. Not conducive for Catering.
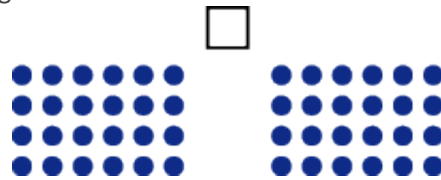
Banquet Style - Used for meals and small groups discussions. 5' rounds seat eight people comfortably.
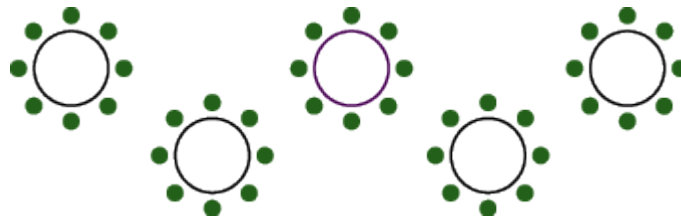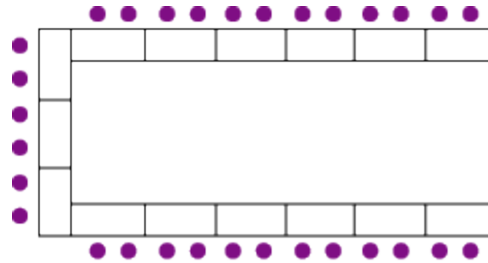
Hollow Square Style - Appropriate for groups fewer than 40 where there is a group leader or panel seated at the head of the set up. Ok with catering.
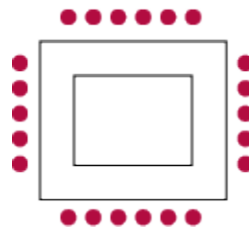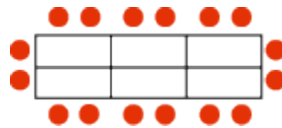
Classroom - Most desirable for long lectures. For large numbers tables will need to be rented. Ok with catering.

U-Shape Style

Conference Style

Sample Agendas

The following are examples of agendas that have been used successfully. Organizers should feel free to build an agenda that works for their event and can take sections of various agendas to meet their needs.

Agenda 1

8:00-9:00 - Initial gathering, registration, coffee
9:00-10:00 – Welcome by host institution and opening presentation
10:00-10:45 – Keynote - FOLIO, Community and Innovation
10:45-11:00 - Break
11:00-12:00 - FOLIO Roadmap, Development and Architecture
12:00-13:00 - Lunch
13:00-13:45 – Speaker - Library
13:45-14:15 – Speaker – Vendor/partner
14:15-14:45 – Speaker – Developer
14:45-15:00 - Break
15:00-15:45 - Breakouts into groups for discussion on FOLIO topics:
      World Cafe concept (topics given in short bursts of time for quick thought generation)

- Community Involvement
- Local events
- Planning for engagement
- Key questions about adoption
- Risks
- Benefits

15:45-16:00 - Report out from World Cafe session
16:00-16:15 - Closing remarks

Agenda 2

9:00-10:00 Registration/Coffee
10:00-10:15 Welcome
10:15-11:15 Meet FOLIO
11:15-12:00 How it works
12:00-13:00 Lunch
13:00-13:30 Community
13:30-14:15 Group Chat 1: Systems - Where are today's systems lacking? What is prohibiting innovation in the automation market?
14:15-15:00 Group Chat 2: Workflows - Which library workflows are in most need of innovation? Which NEW library services can we imagine?
15:00-15:45 Group Chat 3: Collaboration - Where are best opportunities for collaboration? In what ways can this community benefit from other regions, and what advances does this region have to share with other regions?
15:45-16:00 Caffeine Break
16:00-16:45 Group Sharing
16:45 Closing Remarks

Agenda 3
9:00-10:00 Registration / breakfast
10:00-10:30 FOLIO 101
10:30-11:00 FOLIO the platform, the process, the product – what, how, and why
11:00-11:10 Break
11:10-11:30 FOLIO community engagement
11:30-12:00 FOLIO for small and mid-size libraries
12:00-13:00 Lunch
13:00-14:00 Breakout Sessions:
- Technical and architecture
- Opportunities/Priorities/Input for small and mid-size libraries
- Shaping Flexible Futures
- Re-imagining 21st Century
- Information Systems
- New approaches to resource management: cataloging, schemas, linked data opportunities
14:00-15:00 Wrap-up and actions

Sample description of event:
Imagine a community working together to develop technologies that meet the unique functional needs of each library today, while positioning libraries to grow and evolve into the future. In this one-day symposium, discuss the FOLIO project, a community collaboration to develop an open source platform that will support traditional library management functionality and is built for innovation. Join fellow librarians as we explore the future of library technology.

Sample text of Save the Date email:
Imagine a community working together to develop technologies that meet the unique functional needs of each library today, while positioning libraries to grow and evolve into the future. FOLIO uniquely fosters deep collaboration between libraries and vendors in order to share understanding and to

instantiate, promote, facilitate, deliver and sustain a modern approach to library technology infrastructure. FOLIO community members function as peers, each having a particular role and expertise to bring to the collaboration.

Join fellow librarians as we explore the future of library technology. Discuss the FOLIO project, a community collaboration to develop an open source platform that will support traditional library management functionality and is built for innovation. Help envision the future of your library.

Event Title
Date
Time
Location

Featured presenters:

Name, Title, Institution

Be a part of the future of libraries.

Hosted by _____

Sample text of invitation email:
You Are Invited
Event Title
Date
Time
Location

Imagine a community working together to develop technologies that meet the unique functional needs of each library today, while positioning libraries to grow and evolve into the future. In this one-day symposium, discuss the FOLIO project, a community collaboration to develop an open source platform that will support traditional library management functionality and is built for innovation. Join fellow librarians as we explore the future of library technology.

Speakers:

Name, Title, Institution

Panelists:

Name, Title, Institution

Hosted by _____

[Click to RSVP - with a link to the event page]

Sample text of Thank You email

Nice meeting you!

[photo from event]

Thank you for attending the [event name], and thanks to _____ for hosting.

To learn more about FOLIO, please visit FOLIO.org.

If you enjoyed the event, please see our calendar to find more events and webinars.

Did the event get you so excited that you want to know how you can participate in the project? Click here to learn how you can get involved.