Getting to Community Source

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Take away…

- Some things to take away:
  - Open Source is more than just a technological advancement
  - What are the adoption and value drivers
  - The basics around Community Source
  - How does it help you?
  - Risks

More than just tech…

- Open Source is not just a technology
- OS is a means for actually delivering the technology
- OS is a means for economic transfer founded on the technology
- There are a whole confluence of effects:
  - Licensing Freedom
  - Economic/Financial Freedom: Nature of downloading, contributing, fixing, collaborating
  - Control of Destiny

Adoption drivers

- Customers have expressed to us two primary drivers pushing them to adopt OSS:
  - Control of Destiny
  - Economic Factors
- It's about community
- It's **not** communism

Primary value drivers

- Four primary ways of creating value with OSS:
  - Lower licensing and operating costs
  - Collaborative Return on Investment (C-ROI)
  - Service Economies
  - Complementary Product Impact

What is Community Source about?

- It is a specific **form** of Open source
- Like-minded institutions with similar goals
- Create a centrally managed, developed project for those institutions
- Software is NOT a competitive advantage
- Hit the basics, 80/20 rule is important in this model
- It's economic sweet-spot is C-ROI (although it can impact the others)

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Example: Research Management

- Overview
- “Community Source,” consortium development
- Why it works
- Economic and accounting value
- Management software is not a university’s competitive edge

Advantages to Community Source

- Directly speaks to C-ROI
- Directly speaks to Control of Destiny
- Creates community around your goals
- Helps deal with some of the typical problems seen in these projects
  - Maturity, Longevity, Support, etc.

Disadvantages to Community Source

- Customization
- Goals, values, technologies not perfectly aligned
- Comittees: Herding cats

Brass tacks

- Creating the advantages and mitigating the disadvantages
  - Structure
  - Independent organization
  - Commitment
  - Accountability
  - Process
  - 80/20 rule
  - Communications

Structure

- Create an organization that involves all
- Create an organization doesn't allow one interest to override another
- Solution:
  - Non-profit
  - Board-type oversight
  - Committees that are made up of people from each institution for technical and subject matter expertise

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Independent Organization

- The organization needs to be independent of any one agency
- Needs to be able to make operating decisions in support of the entire consortium's goals without putting one agenda over another
- Needs to be able to set goals, deliverables for members independently

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Accountability - The secret sauce

- The “foundation” needs to both be accountable and able to hold members accountable
- “Accountability is the true secret sauce to Community Source”
  - ü Brad Wheeler, Vice Provost For Community Source, Indiana University

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Process

- Committees set baseline target for 1.0 release
- Initial institutions contribute money and developer time to that release
- Foundation is project and product manager
- Once baseline met, 1.0 is released and opened
- Add partners program for new institutions
- Foundation and partners program ensure product maturity, longevity, and support

80/20 rule for features and development

- Find the baseline features that are common to the members' processes
- Make those your 1.0 feature set
- Do **not** program to the exception for each member
- Rather, make a solid architecture that is flexible
- Now the question is, what are the economic values of the 80% and the 20%?

Communication is the key!

- The other secret sauce is communication
- Keep subject-matter experts, technologists, managers, and member-leaders in the know

Your organization

- As you move into Open Source:
  - Identify how it's creating value
  - Try to quantify
    - Remember some costs/values not quantifiable
  - Make sure the value outweighs other issues
    - Legal
    - Support
    - 80/20 rule and C-ROI
    - Etc.

Real costs, real value

- Costs:
  - Labor
  - Development
  - Managing Open Source cycles
  - Infrastructure for managing open source
- Value:
  - The 4 economic drivers
  - Knowledge…Innovate your own IT
  - Destiny
  - Adaptability and choice

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Risks

- Herding cats
- Unable to form the community or ecosystem in a meaningful way
- Violation of the 80/20 rule

Final thoughts

- Destiny and Economics
- Know the accounting **and** economic impact of your project
- Accountability
- Independent organization
- Ignore the FUD-meisters, do your own analysis
- Know your risks
- Stay away from zealots

Thanks!

Questions/Comments?

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Thanks!

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