Making Your Organization Open Source-Ready

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Agenda

- Introduction
- Overview of open source best practices
- Key differences between open source and commercial software
- Implications of Open Source Usage
- Creating a License and Usage Policy
- Creating an Architecture and Product Policy
- Implementing an Open Source Program Office
- Overview of open source best practices redux
- Organizational Open Source Action Items
- Additional Questions?
Introduction

- Bernard Golden – Navica
  - CEO of open source strategy consulting firm working with open source ecosystem members
  - Author of “Succeeding with Open Source” (Addison-Wesley, 2005)
  - Regular blog “The Open Source” for CIO Magazine
Open Source Best Practices

Organization
- Open Source vs. Commercial Software
- License Policy
- Architecture And Product Policy
- Open Source Program Office

Process
- Open Source Maturity Model
- Code Management
- Project Management
- Project ROI

Community
- Joining The Community
- Supporting The Community
- Contributing To The Community
### Key Differences Between Commercial and Open Source Software

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<tr>
<th>Commercial Software</th>
<th>Open Source Software</th>
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<tr>
<td>- Restrictive license</td>
<td>- Expansive license</td>
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<td>- Bundled offering: explicit or implicit</td>
<td>- Unbundled offering: due to OSS economics</td>
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<td>- Active vendor, passive customer</td>
<td>- Active customer, passive vendor/project</td>
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<td>- Key challenge: selecting right vendor</td>
<td>- Key challenge: creating mature product</td>
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Implications of Open Source Usage

- Software may “appear” in your organization and infrastructure via anonymous download
- Expected software procurement processes may be inappropriate in open source world
- Need to develop new approaches that achieve open source benefits while mitigating challenges
Creating a License and Usage Policy

- Is a license and usage policy necessary?
- Implications of internal vs. distribution software use
- Identify acceptable licenses if appropriate
  - Challenge of license proliferation
  - Review of currently implemented open source products
  - Review of likely desirable products’ licenses
  - Include review committee incorporating development, operations, legal, management
- Document and communicate final policy
  - Education is key
  - Initial hire orientation
  - Ongoing reinforcement
Creating an Architecture and Product Policy

- You’ve got the right license policy, but how do you protect your infrastructure?
- Identify existing and ideal architecture
- Define what qualities products must have
  - Implementation language
  - Integration mechanisms
  - Management mechanism
- Defining overall architecture enables wise product selection during Process Phase
- Raises organizational effectiveness, skill amortization
- Reduces employee dissatisfaction, employee turnover
- Reduces risk of “we don’t know how it works, but we hope it never breaks” systems
Implementing an Open Source Program Office

- Goes by different names
- Serves as integration mechanism for license and architecture policy
- Coffee shop/plaza effect
- Increases organizational learning
- May be integrated into existing IT processes
- Most effective as carrot rather than stick
- Most effective as project milestone review rather than one-time event
- Delivery mechanism for license and architecture/product policy
Overview of Open Source Best Practices Redux

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Organizational Open Source Action Items

- Understand key differences between open source and commercial software
- Recognize implications of those differences
  - Anonymous download bypasses traditional procurement process
  - New software realities demand modified processes
- Examine license policy in light of organizational requirements
- Extend policy to incorporate architecture and product requirements
- Create center of excellence and energy with Open Source Program Office
Additional Questions?

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