



DIAL Open Source Center

Strengthening OSS software at the intersection of Humanitarian, International Development, and Peacemaking. Leading the conversation on Open Source Public Goods.

Nov 2019

dial Digital Impact Alliance



Understanding Problems & Challenges

Challenge: Digital Public Goods are investments in technology to achieve the sustainable development goals. Guided by the Principles for Digital Development, these products have embraced open source with the promise that collective investment in common shared assets will lead to better development outcomes. Open Source Digital Public Goods have struggled to achieve scale, maturity, and sustainability. **Why?**

The Case for DIAL's Open Source Center:

Challenges for Open Source Public Goods

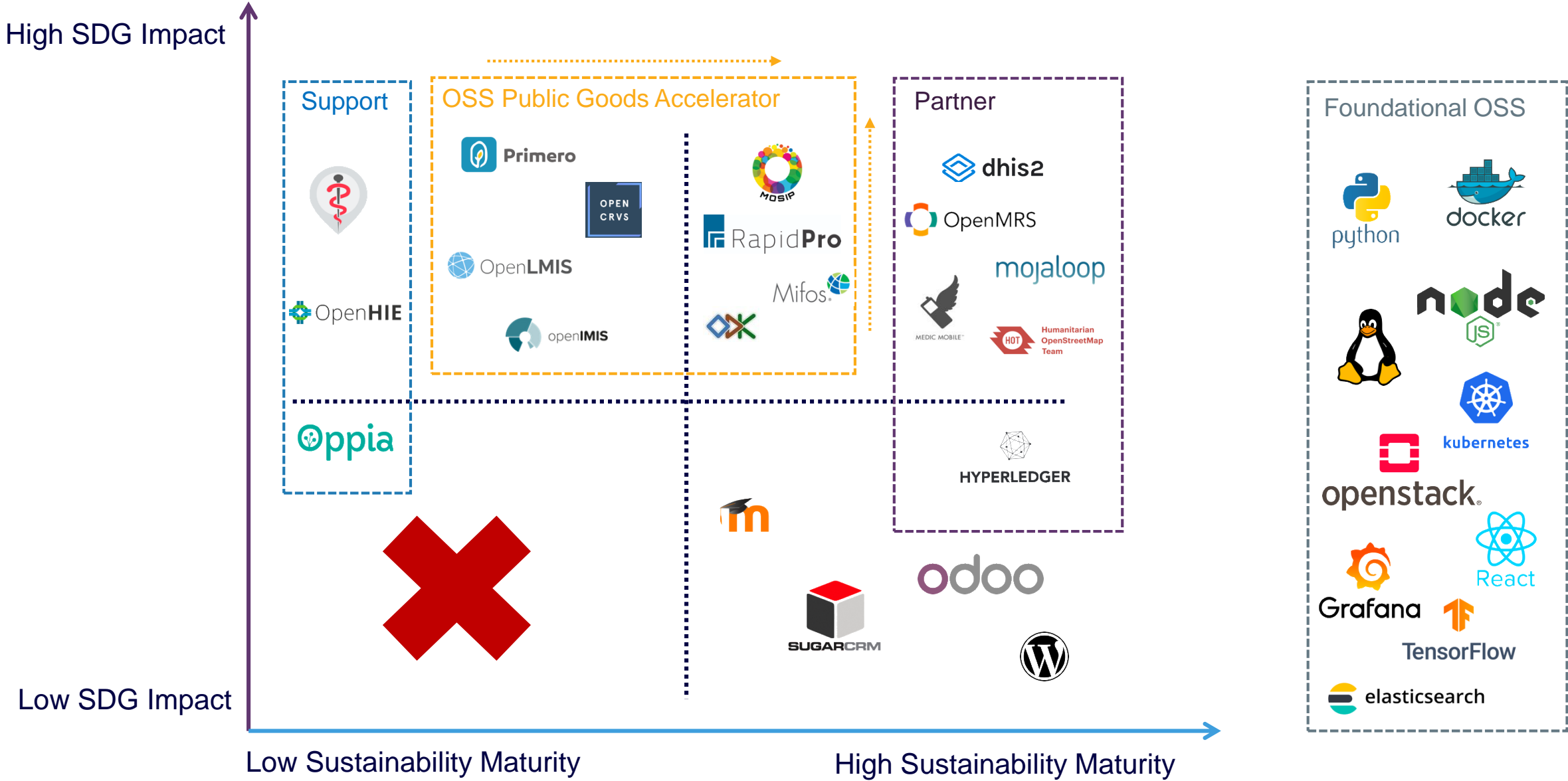
- 1 Underfunded products
- 2 Duplication of effort and fragmentation
- 3 Weak community and governance
- 4 Unclear ownership and responsibility
- 5 Local talent developed to support implementations

DIAL OSC Value Proposition

- 1 Increased ROI and impact of donor investments
- 2 Coordinate public/private partnerships and funding
- 3 Neutral and non-competitive, won't distort market
- 4 Provide community governance, licensing, and organizational home
- 5 Strengthen local talent

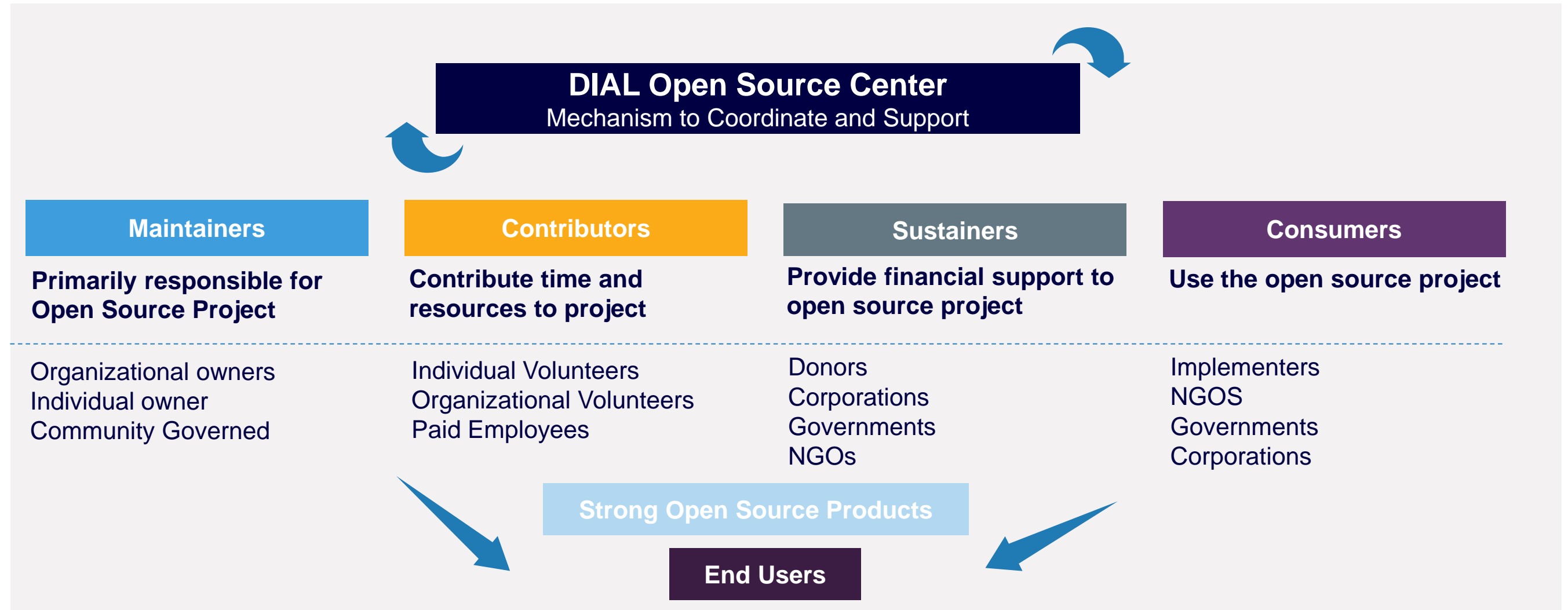
Open Source Public Goods Impact Matrix

Strengthening Open Source Public Goods focused on achieving the Sustainable Development Goals. Increased sustainability and impact is achieved through supporting nascent initiatives, accelerating proven technologies, and partnering with mature projects.



Open Source Public Goods Ecosystem

Successful stewardship requires a diverse set of stakeholders to coordinate responsibilities and contributions.



*Ecosystem Categories from: <https://sustainoss.org/summit/2017/>

Open Source Center: Supporting Open Source Public Goods



The vision of the DIAL Open Source Center is to convene a vibrant and inclusive community for builders of free and open source software, promote knowledge sharing, collaboration, and co-investment in technology and human capacity for positive social change.

- 1 Technical Assistance:** Supplement and extend the capabilities of member projects
- 2 Mentorship Programs:** Support projects with Outreachy, Google Summer of Code, Google Code-in
- 3 Grants:** Help open source projects used in development reach advanced levels of project maturity

Partners:



Member Organizations receiving grants include:



MEDIC MOBILE™



DIAL Open Source Center: Technical Assistance Strategy

Supplementing and extending leading T4D open source software projects through consulting

We offer technical assistance across several areas of expertise:

Community

Legal/Governance

Technical

Sustainability

We offer services throughout the projects' maturing lifespan:

LAUNCH

SCALE

ADAPT

MATURE

- | | | | |
|--|---|--|--|
| <ul style="list-style-type: none">• Structural assessment• Financial/asset stewardship• License and IP planning• Product management and roadmap• Communication platforms | <ul style="list-style-type: none">• Structural assessment• Contributor onboarding• Diversity and inclusion• Code review processes• Documentation systems and planning | <ul style="list-style-type: none">• Structural assessment• Product management and roadmap• Engagement and retention• Recognition programs• Sustainability Analysis | <ul style="list-style-type: none">• Financial and asset stewardship• SQA infra• Metrics and evaluation• Testing and continuous delivery |
|--|---|--|--|

We deliver technical assistance services through several methods:



Network of Consultants

Build a roster of specialized consultants to partner with on TA engagements



Bundle with Grants

Bundling technical assistance with grants provides access to specialized skills.



In Kind or Paid Services

Structuring TA as a professional services offering allows for paid or in kind delivery.

OSC Service Offerings

Community Governance and Legal



Advising & Mentorship	Direct Assistance & Professional Services	Tactical Grantmaking	Partnerships
COMMUNITY SERVICES			
<p>Mentorship programs offered to contributors to create volunteer base</p> <p>Metrics & evaluation: Design, development, implementation, & execution of metrics plan to measure activity of community and progress toward defined goals.</p>	<p>Community strategy assistance for a) contributor onboarding practices and b) engagement and retention of contributor community</p> <p>Recommendations: for best tools and platform etiquette for community management</p>	<p>Assistance with preparation of reports to stakeholders & funders regarding project activities.</p>	<p>Strategic partnerships to promote diversity and inclusion in T4D.</p> <p>Recognition programs for outstanding contributors, volunteers, and other community members.</p>
LEGAL AND GOVERNANCE SERVICES			
<p>License and IP Planning: Understanding the right license for a given project considering their plans & community</p> <p>Financial and asset stewardship: Development of strategy & tactics for budgeting, fiscal planning, fundraising, financial distribution amongst community members.</p> <p>Product management & roadmap: Development of strategy, plans, policies, and processes to develop & maintain software product roadmaps, maintain product feature backlogs & release process.</p>	<p>Support for projects' legal and governance infrastructure.</p> <p>License and IP Planning: preparing projects to accept intellectual property contributions (code, documentation, etc.) from others via OSI/FSF licenses, copyright assignment, etc.</p> <p>Financial and asset stewardship: Review of alternatives and advice for a project's current and future plans, to ensure an appropriate strategy for stewardship of IP and other tangible and non-tangible assets.</p>	<p>Fiscal sponsorships offered, in exchange for percentage of funding.</p> <p>Ensure full stakeholder participation in all stages of product roadmap lifecycle. Plans, strategies, and tactics for maintaining product feature backlogs & release process.</p>	<p>Ensure full stakeholder participation in all stages of product roadmap lifecycle. Plans, strategies, and tactics for maintaining product feature backlogs & release process.</p>

OSC Service Offerings

Technical and Business Sustainability



Advising & Mentorship	Direct Assistance & Professional Services	Tactical Grantmaking	Partnerships
TECHNICAL			
<p>Best practices, Mentorship program, customized roadmap according to maturity and vision.</p> <p>Health/Structural Assessment: Understand project's capacity for customized support</p> <p>Roadmap for projections</p>	<p>Health/Structural Assessment: Positioning and setting for achieving long-term success and scale. Customized approach in building a suitable business model for the project.</p> <p>Direct technical assistance on documentation systems, interoperability, software development, architecture, systems eng, communication platforms and documentation systems</p>	<p>Most grants are for building technical features – Bundling with TA</p>	<p>Communication within OSC network</p>
SUSTAINABILITY			
<p>Business Model and Organizational Structure: goals and tradeoffs of different business structures</p> <p>Analysis of revenue streams and associated costs</p> <p>Roadmap for projections</p>	<p>Health/Structural Assessment: Positioning and setting for achieving long-term success and scale. Customized approach in building a suitable business model for the project.</p>	<p>OSC will offer projects small tactical grants to address neglected bottlenecks affecting project effectiveness and momentum.</p> <p>Fiscal sponsorships offered for project to focus on programming, in exchange for percentage of funding</p>	<p>Facilitation of multi-project collaborative opportunities and provide peer review for proposals; coordination of interoperability projects within a single ICT4D sector.</p>

Open Source Public Goods – What they Need

The vision of the DIAL Open Source Center is to convene a vibrant and inclusive community for builders of free and open source software, promote knowledge sharing, collaboration, and co-investment in technology and human capacity for positive social change.

1

Fiscal Sponsorship: The OSC, Software Foundation, or other legal sponsor to provide legal entity to facilitate legal and funding.

2

An Organizational Home: The primary maintainer of the project with a role in community management, product road map, governance, etc.

3

Advisory and Technical Assistance: Access to resources and consultants to solve project specific challenges.

4

Access to Funding: Stable sources of funds to support core product development. Both grants and internally generated revenue.

5

Connection to a community of Practice: The value of being connected to and collaborating with others solving similar challenges.

Assigning Critical Responsibilities for OSPGs

Legal Fiscal Sponsor

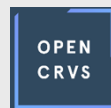
A legal entity that can hold the intellectual property and licenses while being able to accept funding on behalf of the project.

Primary Maintainer

The primary organizational owner of the project with a role in community management, product road map, community governance, etc.

Operational Activities

Operational Activities necessary to support the project including core development, partnership development, etc. Can be spread across multiple organizations in Community.



Open Source Center – Engagement Pathways

The Open Source Center is a organization designed to support Open Source Public Goods. All qualifying projects are granted free associate level membership. Projects can optionally engage with the OSC as Fiscal Sponsor and Operational Owner.

1 OSC Services and Support

Activities:

Community Forum, network access, events, tools, member discounts, access to advisory, participation in mentoring programs, apply to grants.

2 Legal Fiscal Sponsor

Future

Contractual legal home, advisory, IP ownership, receive grants, pay contractors, participate in community management.

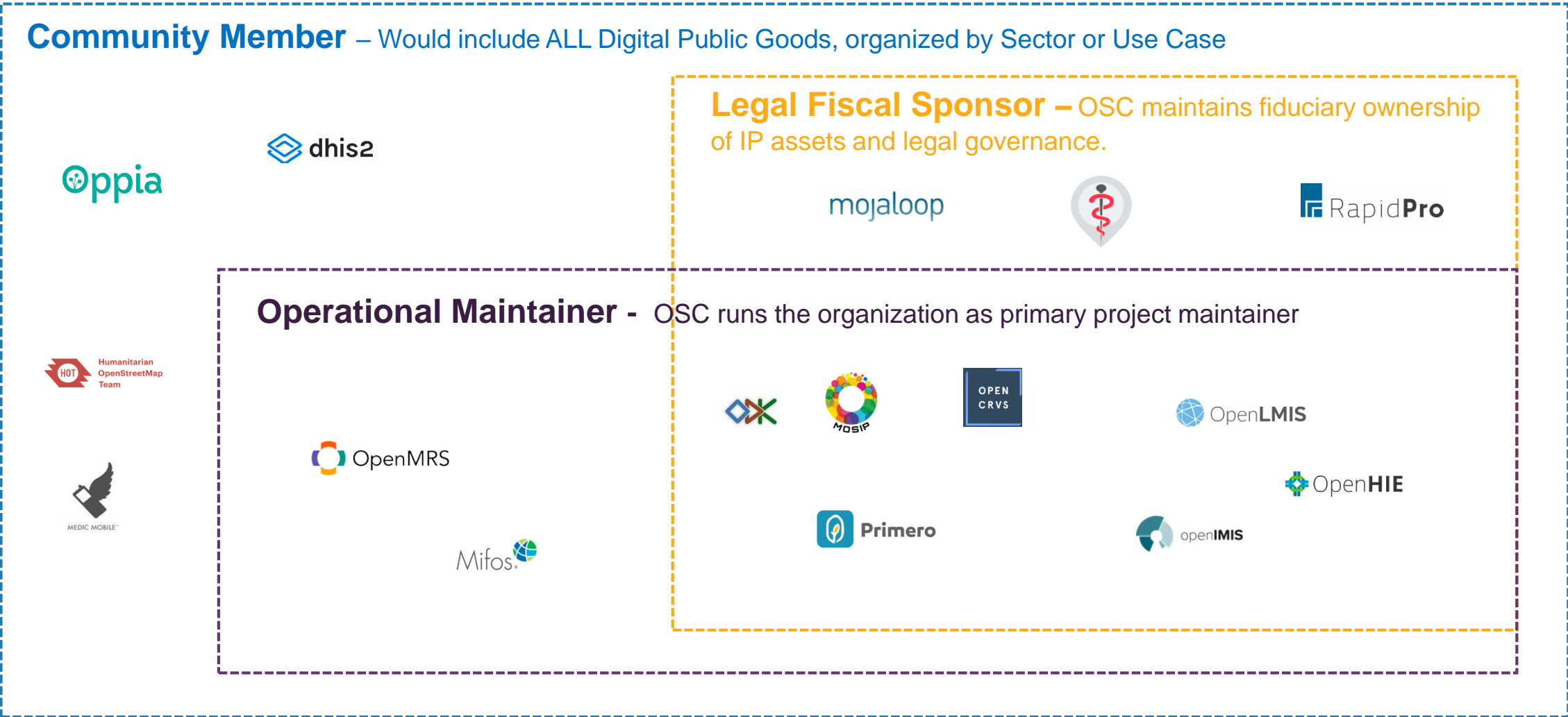
3 Operational Owner

Future

Primary maintainer of project, central community leadership role, maintain product roadmap, manage core development, facilitate implementors.

Digital Public Goods Foundation/Inc Structure

The Open Source Center will provide an organizational home for Digital Public Goods allowing member projects to join as community members but also to utilize the OSC for fiscal sponsorship or as the primary maintainer of the project.



OSC Primary Maintainer Skills Development

”No one left behind” - A strategy for an inclusive skills development program by working on complex open source projects.

Inclusivity Pact: Commitment to build the digital software and data skills to support open source public goods. ”Access for All” policies to govern partners that address with specific actions to bridge the gap in regards to location, gender, disability, age, religion, and sexual orientation.

OSC Core Development Team

Technical Architect– 3 Projects
Community Manager – 3 Projects



Core Software Developer– 80%/20%
Core Software Developer– 80%/20%
Core Software Developer– 80%/20%

Mentorship Programs



External Core Development Partners



Training and Certifications

Project Implementation Partners



Local Implementors

Global Product Backlog (similar to Tidelift or Gitcoin)

The Case for an OSPG focused Foundation and Accelerator

Open Source Projects are increasingly choosing to create an organizational home within existing software foundations that cater to multiple projects. The largest include the Linux Foundation, Software Conservancy, Apache Foundation, and the Mozilla Foundation. There is a strong case to create a similar organization for projects with an international development and humanitarian focus.

Benefits:

- 1 Cost Savings:** By pooling resources across multiple projects, cost savings of **40%** can be achieved through economies of scale with the ability to fully utilize internal employees vs more costly external consultants.
- 2 Focused Team:** OSPGs who have set up their own non-profits have not had the consistent scale or funding to employ more than 1 or 2 full time staff instead relying on part time contractors and volunteers.
- 3 Grant Audit Requirements:** Ability to meet audit requirements of larger grants and sub-contract to smaller organizations, particularly local software implementors.
- 4 Long Term Support Capabilities:** A full time dedicated staff will more easily allow for post launch project and implementor support. Can facilitate, train, and certify a network of implementors.
- 5 Facilitate synergies between projects:** Acting as a primary organizational home for multiple projects will allow for the use of common building blocks, libraries, architectures, etc. Reduce duplication of effort while building components for interoperability.