



## Sakai Newsletter

March 19, 2009

1. From the Executive Director
2. Registration is Open for the 10th Sakai Conference
3. Invitation to Participate in the Teaching and Learning Pre-Conference Workshop!
4. Google Summer of Code
5. 2009 Assessment Institute in Indianapolis
6. Farewell for Now
7. Summary of Library and Sakai 3 Integration Discussion
8. Job Opening: Johns Hopkins Distance Education Manager
10. Sakai Activities Organized into Four Categories
11. Recent Email Group Discussions
12. Events

---

### 1. From the Executive Director

The Sakai Foundation and board of directors would like your feedback and input on a proposed new development process for the Sakai community. As you may know, the Sakai Board of Directors recently conducted a 2-day retreat focusing on the strategic direction for the Sakai Foundation, especially with regard to how it should use its resources to support the Sakai community development process. Over the last few weeks, we have been working on recommendations for changing the development process.

The white paper at the end of this newsletter documents these recommendations. The Sakai Foundation will be working to enact this process and we are eager for your feedback and suggestions for improving the general framework we've outlined. So please feel free to send your feedback to the lists or directly to me.

I will be presenting the new proposed development model for Sakai in a webinar next Wednesday, March 25th at 12:00 Eastern Daylight Time (GMT -4). You can sign up at:

<http://confluence.sakaiproject.org/confluence/x/gQAgaW>

Or send me an email and let me know you'd like to attend. Depending on interest I will hold additional sessions the following week. If there is a large group from a single institution that is interested, you can also feel free to schedule a specific time directly with me.

We look forward to hearing from you.

Michael Korcuska  
Executive Director, Sakai Foundation  
mkorcuska@sakaifoundation.org  
phone: +1 510-931-6559  
mobile (US): +1 510-599-2586 mobile (FR): +33 (0)6 31 11 58 97  
skype: mkorcuska

---

## 2. Registration is Open for the 10th Sakai Conference

Registration is open for the 10th Sakai Conference to be held July 8-10, 2009 at the Hyatt Cambridge, Cambridge, MA. Follow this link - <https://educonference.com/sakai/boston/index.php> = to register for the conference, submit a proposal, and make your hotel reservation. The cut-off for proposal submission is April 10. If you plan to submit a proposal, but will require more time, please let me know.

Vijay Kumar, author of *Opening Up Education*, will be our keynote speaker, and we continue to work to find other featured speakers to make our conference more interesting and informative.

This year, the Sakai Foundation will be charging a fee to all attendees to help defray the cost of food. If you register prior to June 5, the charge will be \$195 for members and \$495 for non-members. After June 5, the charges will increase by \$50 in each category. Our cancellation policy is also shown on the conference registration page. If you are sending 5 or more people from your institution, you may qualify for a discount of \$25 per person (if registered by June 5). To obtain more information on this option, please contact me directly.

We are still accepting logo submissions! If you have an idea for a logo, please send it to me.

The deadlines to keep in mind are as follows:

April 10, 2009 -- Deadline for submitting proposals

June 5, 2009 -- Deadline for earlybird (discounted) registration for the conference

June 5, 2009 -- Deadline for hotel reservations at the Sakai rate

We look forward to seeing you at the conference in July. As always, if you have any questions, please contact me directly.

Mary Miles  
Sakai Foundation Administrative Coordinator  
mmiles@umich.edu  
734-764-3614

---

### 3. Invitation to Participate in the Teaching and Learning Pre-Conference Workshop!

At the 10th Sakai Conference, this July in Boston, the teaching and learning group would like to hold a pre-conference session on the teaching and learning aspects of Sakai (similar to the session of a year ago in Paris). Entitled "Five Minutes of Fame, Five Minutes of Shame, Five Minutes to Frame," this gathering would present brief contributions to foster interest and interchange. Participants are invited to share lessons learned (FAME being positive lessons and "SHAME" being things to avoid doing) as well as to promote (or FRAME) sessions that will be run later on in the conference. The concept is still a work in progress so if you have other ideas or want to present using other formats let us know.

You are invited to present any one or two or all three of the five-minute segments. Please add yourself to the list of participants on the Preconference 2009 page:  
<http://bugs.sakaiproject.org/confluence/display/PED/Preconference+2009+Teaching+and+Learning>

Josh Baron  
Josh.Baron@marist.edu

---

### 4. Google Summer of Code

Google Summer of Code is a global program that offers student developers stipends to write code for various open source software projects over a three-month period. Through Google Summer of Code, accepted student applicants are paired with a mentor or mentors from the participating projects, thus gaining exposure to real-world software development scenarios, growing the open source communities involved, and getting more

code contributed to projects. This year's programme is described here:  
<http://code.google.com/soc/>

Chuck Severance ran the Sakai Foundation's engagement with Google Summer of Code, and Laura James at the University of Cambridge will be doing this in 2009. Five projects are currently suggested -- mostly contributions towards new UI features for Sakai3 -- although students can also suggest their own ideas. This will help Sakai engage with potential new community members, help students get valuable work experience, and also accelerate development of new code. Read more here:  
<http://socghop.appspot.com/org/show/google/gsoc2009/sakai>

Contact Laura James at [laura@caret.cam.ac.uk](mailto:laura@caret.cam.ac.uk) if you would like to be involved mentoring students and/or have additional project ideas. Please bear in mind that the Summer of Code timelines are quite tight (<http://socghop.appspot.com/document/show/program/google/gsoc2009/timeline>).

If students at your institution might be interested in developing Sakai as part of the Summer of Code, do publicise the programme (there's helpful material available at [http://socghop.appspot.com/document/show/program/google/gsoc2009/faqs#spread\\_word](http://socghop.appspot.com/document/show/program/google/gsoc2009/faqs#spread_word))

Thank you.

---

## 5. 2009 Assessment Institute in Indianapolis

Dear Sakai/OSP Colleagues,

I'd like to invite your proposals for sessions at the annual Assessment Institute in Indianapolis, the largest (and best!) national gathering on assessment, to be held October 25-27, 2009. The conference includes an ePortfolio track, which I'll be organizing, and I'd love to receive proposals highlighting the good work being done by members of the Sakai and OSP communities. According to last year's conference evaluation, almost half of the participants came in part because of interest in the ePortfolio track, which will be keynoted by Helen Barrett this year. Your proposals for the ePortfolio track don't need to be limited to assessment uses of ePortfolios, but can address any aspect of portfolios you're interested in. You can find the institute website and online proposal submission form here: <http://www.planning.iupui.edu/institute>. Please feel free to give me a call if you'd like to discuss a possible session. I hope to hear from many of you!

All the best,

Susan Kahn, Ph.D.  
IUPUI ePortfolio  
[skahn@iupui.edu](mailto:skahn@iupui.edu)

---

## 6. Farewell for Now

Folks,

I am sad to tell you all that I will be leaving rSmart. I have had a great time over the past five years getting to work with everyone here.

As many of you may know, I have been dabbling in iPhone application development over the past year. I have decided to stop dabbling and start focusing more time there. Working with Sakai and the community has been great fun, but I think it is time for me to focus on a much smaller platform. ;)

I've made some great friends among you. I'm also sure we'll be staying in touch through Facebook (search [john@dovevalleyapps.com](mailto:john@dovevalleyapps.com)), Twitter (@johnellis) and email. My new email address is [john@dovevalleyapps.com](mailto:john@dovevalleyapps.com). Please feel free to hit me there at any time. Also, if we're not already friends on Facebook and Twitter, please get me there.

John Bush at rSmart will be helping to transition my Sakai community responsibilities. Any questions on those areas should be directed to him.

Thanks again to everyone,

John Ellis  
[john.ellis@rsmart.com](mailto:john.ellis@rsmart.com)  
[john@dovevalleyapps.com](mailto:john@dovevalleyapps.com)

---

## 7. Summary of Library and Sakai 3 Integration Discussion

Thank you to all who participated in the discussion of library integration with Sakai 3 on March 17. We had excellent input from people at a wide range of institutions.

Participants shared their own work on integrating library resources and services with local Sakai implementations, as well as reviewed the Sakaibrary project. This was followed by an open-ended discussion of desired library-related functionality in Sakai 3.

Several participants stated that users need to be able to capture content wherever they are and move it into Sakai. We also discussed effective ways to gather user input to inform the design process of library functionality for Sakai 3. Suggestions included the OSP roadmap model, user experience stories, and asking users what they've been unable to accomplish with Sakai in the past. (Previously collected usage scenarios are available at: <http://confluence.sakaiproject.org/confluence/display/SLIB/Usage+Scenarios+Collected+2009>) We also discussed the best mechanisms for communication. Suggestions included

regularly-scheduled phone/video/Web conferences, identifying the appropriate email list (possibly sakai-user), and using library conferences (ALA, LITA, ACRL) as a meeting place. To move this process forward, Jon and Susan will identify possible communication mechanisms and user input methods to inform the design process. We will share these with the community for discussion.

Thanks again to all who participated in the discussion and we'll be back in touch soon.

Susan Hollar, University of Michigan ([shollar@umich.edu](mailto:shollar@umich.edu))

Jon Dunn, Indiana University ([jwd@indiana.edu](mailto:jwd@indiana.edu))

---

## 8. OpenEAI Project and Emory University Announce Training for OpenEAI

The OpenEAI Software Foundation (<http://www.openeai.org/live/index.php>) has announced that Emory University (<http://www.emory.edu/home/index.html>) and Emory Healthcare (Emory) will host OpenEAI training seminars in March and April 2009. The OpenEAI Analysis & Development training will be held March 23-25, 2009 from 9:00 AM to 5:00 PM EDT and the OpenEAI Deployment and Administration training will be held April 27-29, 2009 from 9:00 AM to 5:00 PM EDT. Both training sessions will take place in the Emory Healthcare Auditorium on the fourth floor of the North Decatur Building at 1784 North Decatur Road, NE in Atlanta, Georgia.

For complete details and to register for these training events, visit:

<https://www.regonline.com/openeai-development> or <https://www.regonline.com/openeai-administration>

The training is free of charge. A donation of \$50 per person is suggested to help cover printing costs for training materials. Reservations for accommodations can be made by contacting the Emory (<http://www.emoryconferencecenter.com/>) Conference Center Hotel or one of the other area hotels listed at:

<http://www.emory.edu/home/about/visiting/hotels.html>

For a detailed description of the OpenEAI Analysis & Development Training, please visit: <http://www.invivoit.com/live/training/OpenEaiAnalysisAndDevelopment.pdf>

For a detailed course description of the OpenEAI Deployment & Administration Training, visit: <http://www.invivoit.com/live/training/OpenEaiAdministration.pdf>

### About OpenEAI 4.0

OpenEAI 4.0 provides an open source architectural framework and development platform that includes a comprehensive set of software APIs, utilities, reference implementations, and other administrative tools designed to enable mission critical data integration

between enterprise applications. The software is a set of foundational APIs for application development and implementing service-oriented architectures. It includes reference implementations of core enterprise services that constitute an Enterprise Service Bus (ESB). It also contains a comprehensive set of runtime management and monitoring scripts, and documentation for managing deployed services and application gateways or connectors. OpenEAI also provides complete reference implementations of typical applications that use these core integration services to request information from other applications and synchronize data changes. Critical infrastructure applications such as message routers, message proxies, point-to-point destination polling applications, and testing applications are also maintained and documented by the project. For more information: <http://www.openeai.org/live/index.php?p=6&sub=1>

Joe Waldygo  
President, TopSpin Communications, Inc.  
[joe@topspinpr.com](mailto:joe@topspinpr.com)

---

## 9. Job Opening: Johns Hopkins Distance Education Manager

Johns Hopkins University in Elkridge, Maryland has a position opening for a Distance Education Manager, req: 38825. For more information and to apply, please visit: [https://hrnt.jhu.edu/jhujobs/job\\_search2.cfm](https://hrnt.jhu.edu/jhujobs/job_search2.cfm)

April M. Wille  
[awille@jhu.edu](mailto:awille@jhu.edu)

---

## 10. Sakai Activities Organized into Four Categories

In order to make it easier to find relevant information about Sakai, particularly for newcomers, we are in the process of re-organizing many of the ongoing Sakai activities into four broad categories: General Information, Building Sakai, Deploying Sakai, and Using Sakai. These categories are based on the Sakai Conference session tracks, which have worked well in grouping related topics into categories of broad interest and collaboration.

Below are general descriptions of these four groups. Soon you will see this grouping reflected elsewhere as well.

**General Information** -- General information covers conferences and meetings, partners program, commercial affiliates problem, demos, and more. Topics in General Information are of interest to all members of the Sakai Community.

**Building Sakai** (The sakai-dev email group.) -- This category is for information and discussions relating to designing, developing, testing and documenting. Sakai members

can learn about the technical details of building tools or integrating services; find guidelines for design and development of tools and services; locate technical specifications; learn about plans for future releases, and more. Designers, programmers, developers, and quality assurance staff will find relevant information in the Building Sakai category.

Deploying Sakai (sakai-prod) -- Deploying Sakai includes information about installing, implementing, configuring, and supporting. Those interested will find release documentation; learn about performance tuning; browse suggested hardware and software configurations; and share examples of training, tutorial and support documentation. The Deploying Sakai category will be of special interest to sysadmins, DBAs, and technical support staff. <http://confluence.sakaiproject.org/confluence/x/Si4>

Using Sakai (sakai-user) -- Using Sakai is about collaborating, teaching and learning, and more. Users can learn about best practices; share experiences; connect with user communities with similar interests, K- 12, Higher-Ed, Portfolios and more. Using Sakai provides important information for teachers, researchers, instructional designers, and end-user support staff. <http://confluence.sakaiproject.org/confluence/x/agCeAg>

Peter Knoop  
knoop@umich.edu

---

## 11. Recent Email Group Discussions

[Building Sakai - Dev] Install SCORM into Sakai 2.5  
<http://n2.nabble.com/-Building-Sakai--Install-SCORM-into-Sakai-2.5-tt2512782.html#a2512984>

[Building Sakai - Dev] Test & quizzes - quick create  
<http://n2.nabble.com/-Building-Sakai--Test---quizzes---quick-create-tt2512413.html#a2512413>

[Building Sakai - Dev] 2.6+Oracle: sakai\_event\_delay table missing  
[http://n2.nabble.com/Re%3A--WG%3A-Sakai-QA---Building-Sakai--2.6%2BOracle%3A-sakai\\_event\\_delay-table-missing-tt2510682.html#a2510682](http://n2.nabble.com/Re%3A--WG%3A-Sakai-QA---Building-Sakai--2.6%2BOracle%3A-sakai_event_delay-table-missing-tt2510682.html#a2510682)

[Building Sakai - Dev] content and mailarchive "runconversion" scripts for 2.6+  
<http://n2.nabble.com/-Building-Sakai--content-and-mailarchive-%22runconversion%22-scripts-for-2.6%2B-tt2505095.html#a2510030>

[Building Sakai - Dev] "Full-Window" Helpers  
<http://n2.nabble.com/-Building-Sakai--%22Full-Window%22-Helpers-tt2504373.html#a2504373>



[Building Sakai - Dev] 2.6.x Fixes to Merge - Unverified: Help request - Update and Details

<http://n2.nabble.com/-Building-Sakai--2.6.x-Fixes-to-Merge---Unverified%3A-Help-request%3A-tt2506215.html#a2509951>

[Building Sakai - Dev] IE 8

<http://n2.nabble.com/-Building-Sakai--IE-8-tt2504790.html#a2504790>

[Using Sakai - Portfolio, User] Sakai 3-ish discussion

<http://n2.nabble.com/-Portfolio--Sakai-3-ish-discussion-tt2486950.html#a2486950>

[Using Sakai - Portfolio] Who uses freeform portfolios in production?

<http://n2.nabble.com/-Portfolio--Who-uses-freeform-portfolios-in-production--tt2486974.html#a2486974>

[Using Sakai - Portfolio, User] Anyone using Portfolio for document approval process workflow?

<http://n2.nabble.com/Re%3A--Portfolio---DG%3A-User---Using-Sakai--Anyone-using-Portfolio-for-document-approval-process-workflow--tt2505204.html#a2505204>

[Using Sakai - User, Teaching & Learning] Migration strategy - Old LMS support

<http://n2.nabble.com/Migration-strategy---Old-LMS-support-tt2510858.html#a2510858>

[Using Sakai - User] Gradebook "Student View"

<http://n2.nabble.com/-DG%3A-User---Using-Sakai--Gradebook-%22Student-View%22-tt2491413.html#a2491413>

[Using Sakai - User] Sakai translation

<http://n2.nabble.com/-DG%3A-User---Using-Sakai--Sakai-translation-tt2437998.html#a2437998>

[Using Sakai - User Experience] Sakai Design Patterns?

<http://n2.nabble.com/-DG%3A-User-Experience--Sakai-Design-Patterns--tt2457824.html#a2458273>

---

## 12. Events

Second Rhode Island Sakai Conference

March 31-April 1, 2009

Providence Biltmore Hotel Providence, Rhode Island

[www.ri.net](http://www.ri.net)

2nd European Sakai Conference

May (4)-5-6, 2009

Stockholm University

Stockholm, Sweden

<http://confluence.sakaiproject.org/confluence/display/CNF/European+Regional+Conference+in+Stockholm+2009>

eLearning Africa

09 May 27- 29, 2009

Le Meridien President

Dakar, Senegal

[www.elearning-africa.com](http://www.elearning-africa.com).

2009 MoodleMoot San Francisco and 2nd Sloan-C Symposium on Emerging Technology in Online Learning

June 17-19, 2009

Hyatt Regency San Francisco

San Francisco, California

<http://moodlemoot.org/course/view.php?id=9>

<http://www.emergingonlinelearningtechnology.org/>

10th Sakai Conference: Boston

July 8-10, 2009

Cambridge Hyatt

Cambridge, Massachusetts

<http://www.sakaiproject.org/portal/site/sakai-news/page/04ed2fa2-77e2-40da-8100-e0a08b9fea15>

Assessment Institute in Indianapolis

October 25-27, 2009

The Westin Indianapolis

Indianapolis, Indiana

<http://www.planning.iupui.edu/institute>

-----

Here are email addresses to contact if you encounter problems with various Sakai Community systems:

Collab -- [collab-admins@umich.edu](mailto:collab-admins@umich.edu)

Confluence -- [confluence-admins@collab.sakaiproject.org](mailto:confluence-admins@collab.sakaiproject.org)

Jira -- [jira-admins@collab.sakaiproject.org](mailto:jira-admins@collab.sakaiproject.org)

# 2009 Sakai Development Process

## Sakai Board of Directors Recommendations

---

Michael Korcuska

### SUMMARY

This document describes the recommendations of the Sakai Board of Directors arising from the Sakai Board Retreat in February 2009.

## Executive Summary

In response to demand from the community for more formalized development processes and a roadmap for Sakai development, the Sakai Foundation will use its resources to encourage the creation of:

- (a) Formal, structured development projects to deliver functionality prioritized by end-users;
- (b) A product council to set the bar for the inclusion of functionality as part of the Sakai product and to accept the transfer of responsibility to the 'maintenance group'; and
- (c) A 'maintenance' group within the Sakai community that ensures stability in production, performance, bug fixing, etcetera.

Not all of the elements are fully developed and this document focuses mainly on the overall process and the product council, but work is ongoing to develop the full scheme. We want to publicize this 'manifesto' to gather comments and gauge support. Comments that help improve the plan are extremely important, but we are beginning to implement this approach as we seek suggestions for improvement.

## Background – Sakai Product Definition

The recommendations here are best understood in the context of a common vision of what Sakai, as a product, aims to accomplish. We therefore offer the following draft Sakai product definition.

1. Sakai is an enterprise friendly, service-oriented platform that enables the web-based support for various groups in educational institutions.
2. Sakai implements open standards wherever possible and releases open source software with a liberal, commercial-friendly license. It supports open courseware and open educational resources.
3. There is a strong Teaching and Learning community within Sakai that seeks to ensure sector-leading CMS/LMS/VLE features are available on the platform.
  - 3.a. Distance Learning is specifically supported
  - 3.b. Face-to-Face teaching is specifically supported
  - 3.c. Portfolio use cases are specifically supported
4. There is a strong Research community within Sakai that seeks to ensure sector-leading VRE features are available on the platform. This includes inter-institutional research collaboration features
5. There is also a strong community with interest in Content Management and Collaboration features for other education-related activities, such as Clubs, Societies and Administrative groups.
6. Not all campuses will necessarily deploy all features, nevertheless:
  - 6.a. There is a desire for both a consistent user experience throughout the range of features and an open platform that allows ready integration of best of breed 3rd party applications. We recognize that this creates a challenging dilemma for user experience.

- 6.b. There is a desire to create solutions with market-leading accessibility and usability

We welcome elaborations, clarifications and polishing of this definition.

## Background - Development Model

The thinking behind the proposed approach uses a fairly conventional product lifecycle with the following stages:

- **Research and Development.** This stage is where new ideas are generated and new technologies are tried. Many “contrib” projects in Sakai are essentially in this phase of the cycle for the purposes of this model. Other contrib projects are certainly much too mature to be considered R&D—they just choose to be independent of the Sakai release. The new model will allow this same sort of “independent” project.
- **Incubation.** This stage is for projects that intend to end up in a Sakai release. The goal in the incubation stage is to prove the desirability to the community, formalize project requirements, assemble a cross-institutional development team that includes functional expertise, build a project & maintenance plan and reduce development risks.
- **Product Development.** Incubation should prove that a project is both desirable and feasible. The product development phase is essentially executing on that plan. It ends when the project becomes part of the Sakai release. We expect formal structures to ensure the reliable allocation of resources and that the operational decisions during the project are driven by end-user priorities.
- **Maintenance.** This phase is for bug fixes and feature enhancements to released product.
- **End of Life.** Sooner or later things need to be taken out of the product. Or a new version needs to be built.

Sakai, unlike some other open-source initiatives, has distinct user and developer groups. Rarely do you see a student, a professor, or a researcher write the lines of code necessary to make the product better. This particular challenge makes us wish to be more methodic and creative in the way we manage the development of the platform. At the same time, the notion of a centralized organization controlling most aspects of Sakai development is also not appropriate for the Sakai community at this time.

The degree of process formality differs with each stage. In Research & Development, for example, a distributed model is best—one that doesn’t require approval or decision-making from a central authority. We call this way of working “organic”. As ideas emerge from R&D that appear to have merit, it is crucial to increase communication about the project and begin to put together a more formal development team and plan. We call this “coordinated”—the idea is to bring together people who might want to work together to create a significant new capability in the Sakai release. And once such a group of people is identified and their objectives clarified, a more traditional and formal project structure is beneficial. We call this “managed”.

We also know that different institutions and individuals in Sakai will respond differently to each of these ways of getting work done. So the proposed model uses a different organizational strategy at each phase of development and therefore allows for different ways to engage in Sakai. While it keeps the ownership of Sakai’s capabilities in the community, we believe it brings more oversight into the officially released product.

Finally, the Sakai Foundation’s role in each of these phases will be different. The following table provides a summary of the style of work, the role of the foundation and the entry criteria for each stage.

<b>Phase</b>	<b>Work Style</b>	<b>Foundation Role</b>	<b>Entry Criteria</b>
Research and Development	Organic	Infrastructure (svn, jira, confluence), communication and encouragement.	None. Anyone can have an R&D project.
Incubation	Coordinated	Infrastructure, communication & potential direct support from foundation resources; particularly in matchmaking institutional resources and communicating requirements of later stages.	Low. Anyone can declare that they would like their project to enter incubation. Foundation resources will not be able to support every project & a method will need to be established for any such prioritization.
Product Development	Managed	Infrastructure, communication & potential direct support from foundation resources. Facilitation of the decision to include project outputs in a release.	Moderate: A strong plan & adequate resources. Transition to next phase has high barriers, so plan to attain those criteria is important.
<b>Release</b>			
Maintenance	Managed or Coordinated (TBD)	Infrastructure, communication & potential support from foundation resources. Possible management of a <i>centralized maintenance team</i> .	Product Council. A small group that will decide if a project is ready be in the release. See below for details.
End of Life	Coordinated or Managed	Infrastructure, communication & potential support from foundation resources.	Product Council decision.

We feel strongly that this model is achievable by the Sakai community and will lead to the desired outcomes of an end-user driven set of development priorities, a more predictable and efficient development process and a useful roadmap of Sakai development. However, it will only work with the enthusiastic engagement of the community – we need your help.

The product council will act primarily as a gatekeeper around the Sakai release and the maintenance phase (entry and exit), but will also offer coaching and guidance at other stages. Gate-keeping decisions by the product council will be transparent. That means criteria will be public and open to community development and decisions will be explained openly.

The Sakai Foundation will facilitate the work of the Product Council and will try to help projects with communication, resource recruiting and a variety of other things. But Foundation staff resources are limited and the projects themselves have a responsibility to provide documentation, updated schedules and other information.

## The Product Development Phase

The Product Development Phase is a crucial phase in the new process and, so, we are giving it a bit more attention in this document. For project outputs to exit this phase and be incorporated into the release they will need to meet the community criteria and fit well with the existing product. The Product Council will make the formal decision. (The existing provisional/core criteria represent a starting point for these criteria).

We expect successful projects will have formal management arrangements. While the Sakai Foundation is not dictating to the community how projects in this phase must be organized, we are encouraging the formation of development teams that:

- Is strongly influenced by functional experts
- Have a source of user experience, accessibility and internationalization expertise
- Have a project plan with scheduled milestones, opportunities for community input & contingency plans for major risks. This probably, but not necessarily, implies a project manager.
- Have a plan for maintenance & support
- Have a cross-institutional project team

Not every project will need the same resources, of course. But overall we are looking for projects to adopt more formal organizational structures (become “managed”) as they move from R&D to the release.

## Conclusion & Next Steps

We look forward to working with the Sakai Community to refine this development process. Michael Korcuska, Sakai Foundation Executive Director, will be conducting webinars for the community and is available for phone meetings for anyone who wishes to discuss the proposal. You can also send feedback on this document to [mkorcuska@sakaifoundation.org](mailto:mkorcuska@sakaifoundation.org) or to the public list [management@collab.sakaiproject.org](mailto:management@collab.sakaiproject.org).

More information is provided below in three appendices. Appendix A provides additional detail on many of the ideas mentioned above. Appendix B explains the “Sakai 3” work in relation to this process. Appendix C describes the process that led to this document’s creation.

## Appendix A: Additional Information

A few of items mentioned in this document warrant more explanation, including the following:

- The role of the Product Council
- The formation of the Product Council
- The potential support from foundation resources
- The centralized maintenance team
- Independent projects

### The Role of the Product Council

The formation of the Product Council is a significant addition to the Sakai development process. Without some oversight of what goes into the Sakai CLE, we feel that the coherence of the release is at risk.

The ultimate role of the product council is to determine which projects are incorporated into the formal product release. That is their only formal authority. The product council will use a transparent process for decision-making. Where possible, decisions will be evaluated against defined and objective criteria. Certain decisions will require more subjective standards and, in these cases, the reasons for any decisions will be clearly and openly communicated. The product council will also seek expert review from persons not on the council.

We anticipate that projects will want some indication from the product council that their project is a good candidate for the release. Therefore, even though its only formal authority is to evaluate a projects readiness for release, we believe it will need to advise incubation projects about their readiness to enter the product development phase.

Note that while the Product Council may be consulted for advice during the project, the product council will not direct project resources or tell projects how to conduct their business. They will tell them if the work itself is ready for release.

### The Membership of the Product Council

The council will be made-up of a group that brings the different areas of expertise required to effectively fill the product council function. We expect our understanding of the skills required to evolve over time, but the initial view is that the following areas of expertise are required:

- User experience, including accessibility and usability
- Teaching and learning
- Research
- Software design and architectures
- Software production management



The product council will also include the Executive Director of the Sakai Foundation and a Sakai Product Manager, who will facilitate the group.

In addition to these areas of expertise, all product council members should also have the following:

- A broad understanding of the Sakai product
- The ability to advocate for the needs within his/her area of expertise and maintain a broad view of community and product needs
- Demonstrated commitment to engage with and contribute to the community
- Deep expertise in more than one aspect of the product

To form the product council, the Sakai Board will communicate the role and desired contribution of the council. The Board will be open to suggestions and nominations from the community, but will seek to quickly identify the initial product council members. The product council and the Board will together identify a process to evolve council membership over time.

### **Foundation Support for Incubation Projects**

The Sakai Foundation will support certain projects, especially those in the incubation phase. This may be assistance with communication, help recruiting additional resources or filling specific product development roles with consultants. Our capacity to do this is not unlimited, however, so we will likely choose incubation projects to formally support. This is not meant to indicate that these projects are more official or in some way better than other incubation projects. It does indicate we think they are important, of course, but it could be that other projects simply don't need our help.

Our assistance may carry over to the product development phase, but we hope that these projects have enough community support to build an adequate team.

### **A Centralized Maintenance Team**

We would like to explore the idea of a centralized maintenance team. This group would fix bugs in projects that have made it into the release. The existence of this team would be a strong incentive for projects to pass through the development stages listed above, because the development team would be released back to the project institutions for new development work. Note that this will not absolve institutions and individuals from supporting their work in maintenance but, rather, allow for a transition period and safety net.

More work is required to define how such a team would work. Most likely it would be directed by the Sakai Foundation rather than the Product Council.

## Independent Projects

This model does not eliminate the option for projects that wish to have their own development and release cycles and appear as extensions or add-ons to the main release. This is just like contrib project today that are in wide use by the community (e.g. Melete).

## Appendix B: Sakai 3 and the New Process

Sakai 3 has gotten a lot of attention lately. In the context of this new process, we would say the following:

- Cambridge has been leading a group of people working on projects that we hope will form the basis of Sakai 3.0. None of these projects are officially Sakai 3 at this point in time.
- The first of these projects is K2—a new kernel that enables several proposed goals for a new version of Sakai. At its current stage of development, this project would probably be in the incubation stage.
- The second of these projects has no official name but focuses on a new user experience for key areas of Sakai, especially those areas traditionally associated with project sites. This project has been called Sakai 3 and, to date, has focused on the UX framework, project site functionality & content authoring. We will be asking the team to pick a code name for their effort. There is a strong desire to turn it into a managed project so it could also be thought of as being in the incubation stage.
- The Sakai Foundation is currently supporting both of these projects and expects to continue to do so actively.
- More resources are needed to turn the current K2 and User Experience projects into Sakai 3. The scope of work also needs to be expanded according to end-user priorities. It is hoped that the framework described in this document will encourage the formation of a formal project or projects to this end.
- Because the Product Council eventually determines what goes into a release and there will be a lot of moving pieces in Sakai 3, we see the council playing an important role in Sakai 3.
- It is likely that large changes to Sakai 2.x should also go through this process. Work like Assignments 2 and Gradebook 2 seem significant enough to place into this context. Smaller changes to existing features will not go through this process.

## Appendix C: Why a new Process?

A variety of people in the Sakai community have been feeling that the Sakai development process was in need of a change. The current process, which is highly decentralized, has worked adequately for the incremental improvements that have characterized the recent Sakai releases. It has been too difficult, however, to initiate significant new feature development that would require cross-institutional collaboration or, like the UX initiative, would require changes across much of the code base. But even with the relatively steady state that Sakai 2.6 represents, it has been difficult to publish a meaningful roadmap in advance of code freeze. So while a large change like Sakai 3 underscores the need for change, the need has really been there all along.

Various grass-roots efforts at improving the situation had not borne fruit so, in late 2008, the Sakai Foundation determined that it should undertake a strategic planning exercise that would examine the role of the Sakai Foundation in the community's software development process. This exercise culminated in the Sakai Foundation Board Retreat that took place in February 2009. As inputs to the retreat we conducted a survey, completed by approximately 50 institutions and 150 individuals. An external facilitator (Kim Thanos) also interviewed a number of organizations around the Sakai community. The result of the 2-day retreat (and subsequent emails and phone calls) is the new model for development described in this document.