Sakai Executive Brief

Michael Korcuska

Executive Director

January 2010

Agenda

- SF Goals & Metrics
- Looking back at 2009
    - New process, new staff
- Looking ahead to 2010
- Foundation Finances

Sakai

Goals

- SF Financial stability
- Communication (internal and external)
- Adoption of Sakai
- Community Development
- Product Development
  - Process
  - Sakai 2
  - Sakai 3

Sakai

Finances & Communication

- Finances
    - Large enough budget to support the mission
    - Predictable revenue/expenses
- Communications
    - Community feels informed about project
    - Instituting a survey (first one was last year)

Sakai

Adoption

- Enough Adoption for:
  - Credibility in the market to make Sakai a safe choice
  - Attract 3rd Party integration work
- How much is that?
  - 15% of US non-profit Higher Ed enrollments
  - Where are we?
    - 15%+ for Research Universities
    - 5%+ across entire spectrum

Sakai

Community Development

- Rich, interactive community (as measured by)
    - list activity
    - conference participation
    - developer participation ([ohloh](#))
    - infusion of "new blood"
        - New organizations
        - New roles (more functional participation)

Sakai

Product Development

- Process
  - Increased visibility into roadmap
  - Structure that supports top-down and bottom-up contributions
- Sakai 2.x
  - Continue introducing features until 3 is in sight
  - Increase quality
- Sakai 3
  - Create the next generation Sakai

Sakai

2009 Recap

- Strategic Retreat in February
    - New product development process
    - Product Manager: Clay Fenlason
    - Communications Manager: Pieter Hartsook
- Communications Highlights
    - Executive brief
    - New Sakai Project Website

Sakai

R&D
- Mostly Organic
- No criteria on activities or development team

Incubation
- Coordinated, with selective support from Sakai Foundation
- Projects that intend to enter main product

Product Development
- Major Projects: Managed, Smaller Projects: Coordinated
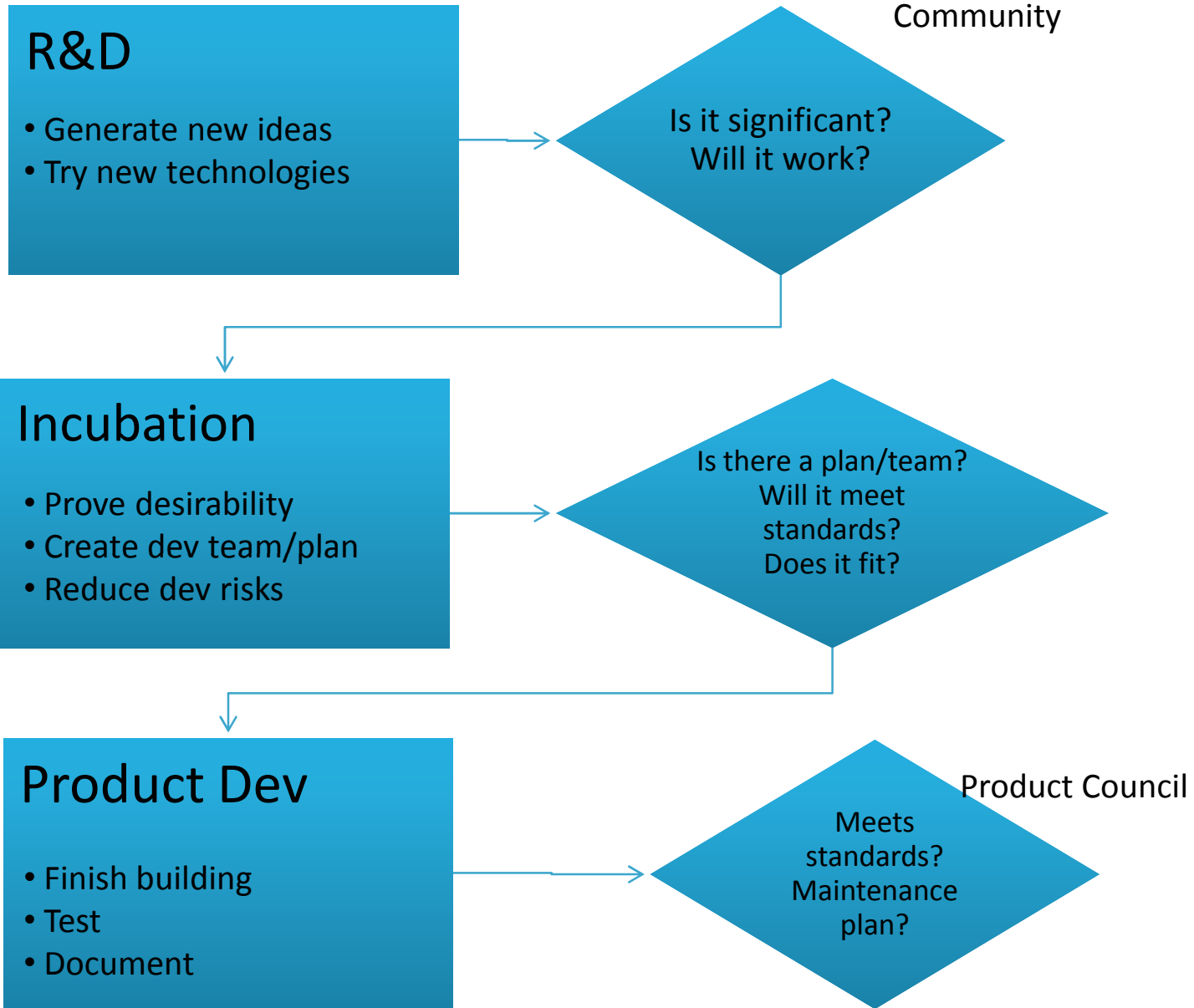- High bar to leave this phase

Maintenance
- Coordinated
- For bug fixes and minor feature additions

End of Life
- Coordinated/Managed

Product Life Cycle

Sakai

Major Product Changes

R&D
- Generate new ideas
- Try new technologies

Community

Is it significant?
Will it work?

Incubation
- Prove desirability
- Create dev team/plan
- Reduce dev risks

Is there a plan/team?
Will it meet standards?
Does it fit?

Product Dev
- Finish building
- Test
- Document

Product Council

Meets standards?
Maintenance plan?

Sakai

Product Council

- **Authority:**
  - Decide what is in the official release
- **How:**
  - Based on objective criteria as much as possible
  - Open process and document decision-making
- **Also:**
  - Provide guidance to incubation projects who are wondering what they need to do to make the release

Sakai

2.7 Product Council

- SiteStats to main release
- BasicLTI to main release
- Profile 2 to main release
  - After significant massaging
- Conditional release to main release
  - Off by default
- TinyURL service not approved
  - No consensus on approach
- Gradebook 2 not approved
  - Licensing issue

Sakai

2010 Focus: Product

- Process
  - Review of product council after 2.7
  - Applying process to Sakai 3
- Sakai 2
  - Getting 2.7 and 2.6 maintenance releases out
  - Planning for Sakai 2.8
- Sakai 3
  - A usable hybrid release by end of year
  - On track for usable release in 2011

Sakai

2010

- Overall Goals
  - Execute on initiatives started in 2009
    - No major new initiatives planned
  - Help Sakai 3 move forward
    - New models of collaboration?
  - Re-examine mission and long-term plan
  - Build membership base

Sakai

Mellon RIT

- Mellon RIT folded into Scholarly Communication program

- Probably means less funding for OS projects in Higher Ed...but maybe not

- No impact on Sakai
  - Sakai hasn't received RIT money since original grant
  - Sakaibrary was funded by Mellon Scholarly Communications

Sakai

Focus: Community

- The 2010 Sakai Conference
  - Denver, June 15-17
- Sakai Europe
  - Valencia, March 1-3
- Focus on bringing T&L expertise into Sakai 3 development
- Help rebuild user experience community

Sakai

2010 Focus: Communication

- Finalize and Execute [communication plan](#)

- Experiment with (weekly?) "project activity" summaries

- Revising Sakai 3 materials (Q1)

- Incremental website improvements

Sakai

2010 Focus: Adoption

- Keep website quality high
  - Visits and time on site up substantially
- Remind community to submit presentations to industry conferences
  - Peer marketing is the best we can do
- Work with commercial affiliates to create more case studies
- Work on "open source procurement" white paper (With Kuali)

Sakai

Focus: Financials

- Financial challenges
  - Current expenditure level exceeds revenue
  - Additional staff roles
  - "Non-adopting supporters" are dwindling
- Undertaking membership drive
  - Targeting 50 Sakai users who are not members
- Considering revising membership pricing
  - Increase for large universities
  - New levels for colleges & smaller institutions
- Conference becomes break-even this year

Sakai

Expenditure Categories

2007 Conference 366K (net)
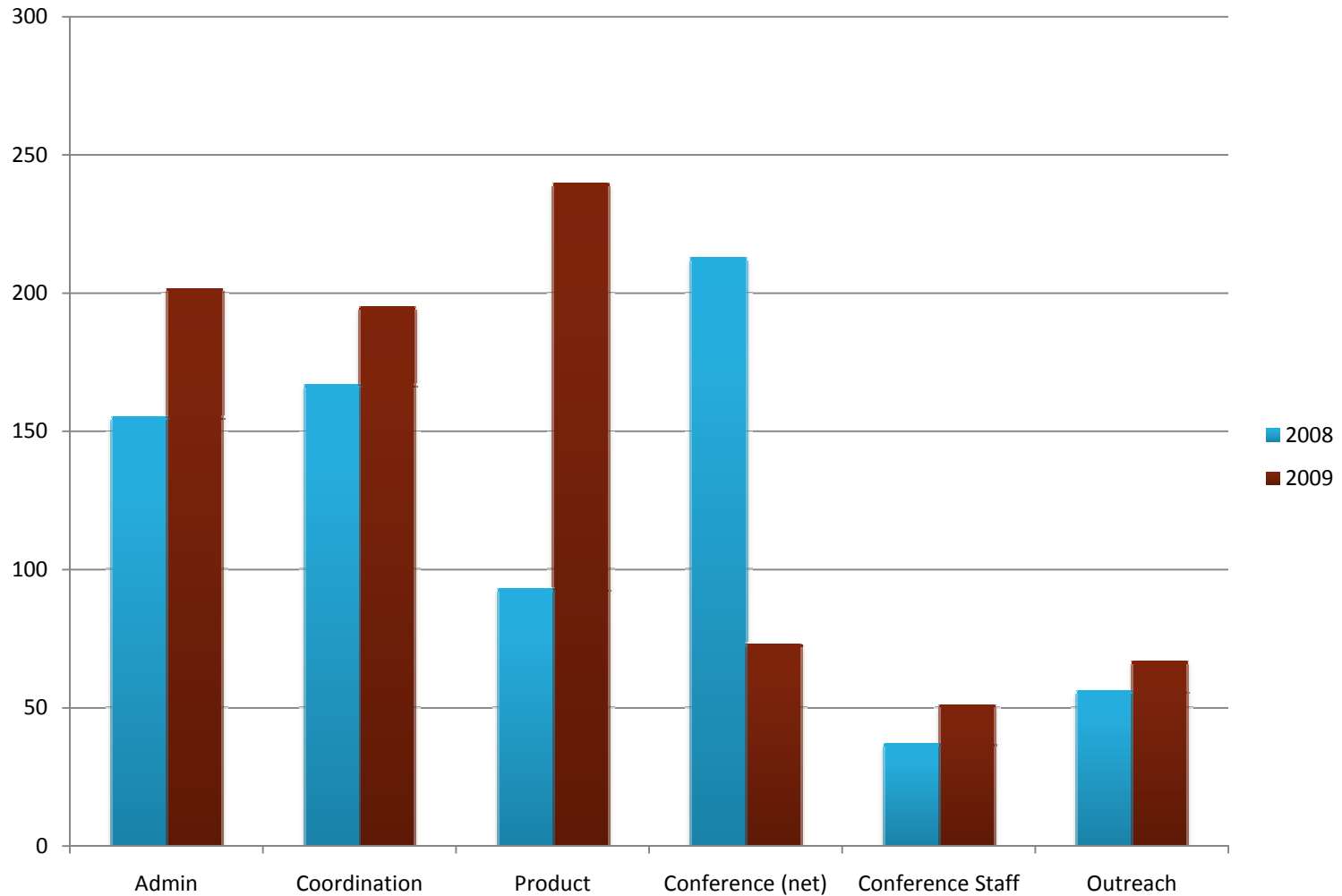
Strategic Direction Questions

- Should Sakai remain independent or join with related OSS projects?

- Should Sakai continue as a "coordinated" project or

  - Move to more centralized approach?

  - Have the SF play a less active role?

Sakai