Introduction to 2-3-98:
Lights, Camera... Action

- or -

Mission Impossible:
*Gh**OS**t Protocol*
(due out in 2011)

Patrick Masson
masson@umassp.edu

"Scratching my personal itch"

- 1992-2000: Programmer Analyst at UCLA
- 2000-2004: Director, UCLA CHS Media Lab
- 2004-2007: Director of Technology, SUNY
- 2007-2010: CIO, SUNY Delhi
- 2010- ???: CTO, Univ. of Mass, UMassOnline

Let's Play...
Open Source (in) Jeopardy

Guess the year...

- Product support concerns

- Awareness/knowledge of available solutions

- Security concerns

- Lack of support by management

- Licensing or legal concerns

- Investment in architecture from other vendor(s)

- Lack of formal support

- Velocity of change

- Lack of a roadmap

- Functional gap

- Licensing caveats

- Lack of commercial support

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2008

2/3/98 PROJECT

THE OPEN PLATFORM

Guess the year...

- Already using commercial options

- Lack of standards

- Forking code

- Not reliable

- Lack of testing

- Lack of technical skills

- Unfamiliarity with open source options

- Lack of commercial vendor support

- Legal concerns about licensing

- Does not conform to internal policies.

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2/3/98 PROJECT

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Last Week

http://www.highbeam.com/doc/1G1-75655930.html

http://www.futureopensource.net/2011-survey-results

Guess the year...

- Open source is way too expensive.

- Our teachers won't use open-source software.

- The tech department will have to learn a new way of doing things

- Open-source products aren't as good as their mainstream counterparts.

- There aren't any opensource administrative or management products

- Open source isn't reliable or supported

- Big [universities] don't use open source

- Lack of commercial vendor support

- Open Source is hostile to intellectual property.

- The Open Source movement isn't sustainable

- Open Source is playing catch up to Microsoft and the commercial world.

http://schoolcio.com/ShowArticle/38200

http://www.oreillynet.com/pub/a/oreilly/opensource/news/myths_1199.html

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April 2011

1999

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2-3-98: What it means...

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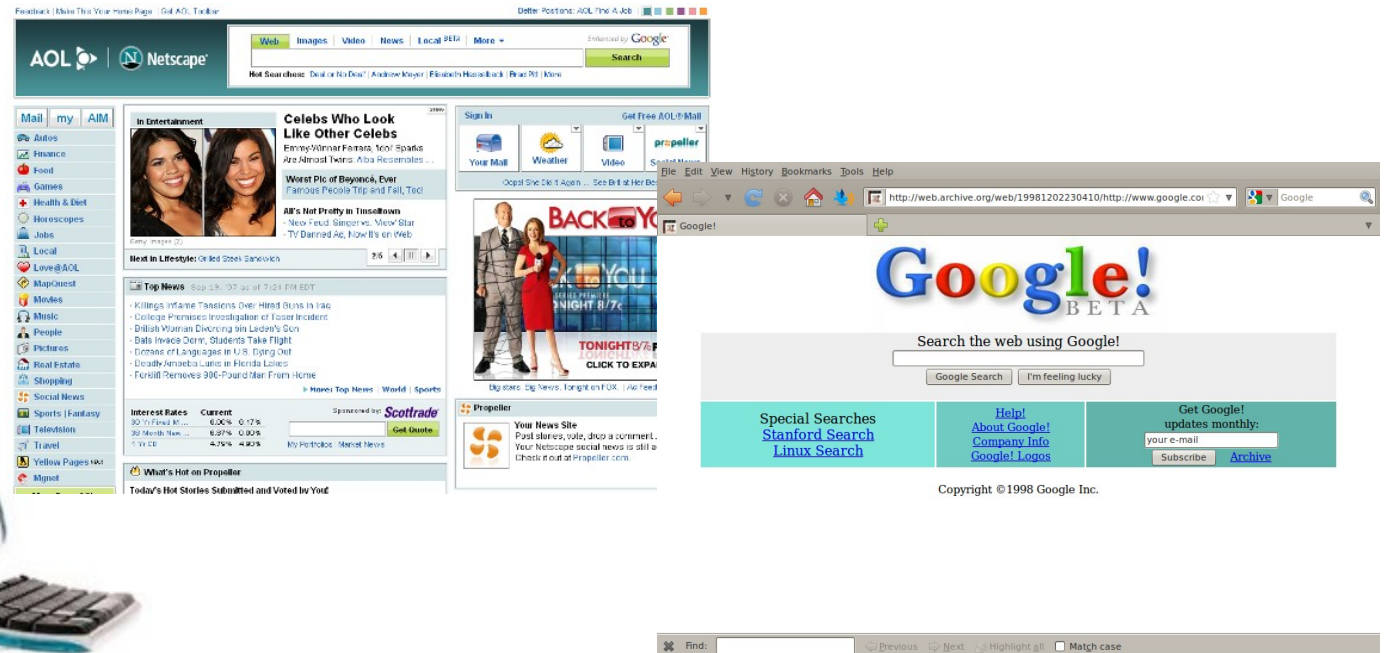February 3rd, 1998 in Palo Alto, California.

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2-3-98, What it means to us...

Changing an LMS is disruptive" and the attractions of open source haven't been substantial enough (yet) to make us change direction.

The open source acquisition model is totally different than the commercial software acquisition model.

I'm nagged by... questions about the cost of open source versus commercial software.

Other costs are high in hiring developers to keep the products functional.

Open source solutions are not like free beer; much more like free puppies!

Open source... requires increased management and communication to undertake many of the functions that a vendor does in providing product research, development, documentation, training and consultation.

What you give up in license fees you may gain back in internal support costs especially if you want to do modifications or add-ons to the base software.

The EDUCAUSE CIO Constituent Group Listserv

13 years of development and many in senior decision-making roles within institutions of higher education are still asking the same questions about the feasibility and viability of open source software.

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Who is talking about benefits?

- Lower costs

- Pace of development

- Feature scope

- Quality (reliability/stability through peer review)

- Professional development

- Audit-ability: security

- Customization: contributions and/or direction

- Flexibility: integration and interoperability

- Freedom: choice (migration-or not, support)

- Continuity: availability (mergers and acquisitions)

Who is talking about benefits?

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"I would love to see a study that compares this open-source "support" model to the more traditional vendor support model..."

The EDUCAUSE CIO Constituent Group Listserv
February, 2009

Over the years I've read at least a thread or two on this list expressing some reservations about whether the traditional RFP process (and purchasing departments) can author RFP documents that give proper consideration to open source options. Are these reservations legitimate?

The EDUCAUSE CIO Constituent Group Listserv
October, 2009

It would be great if someone could write a nice article "Open Source Explained" that could lay out the wide range of models that all fall under the definition of "Open Source"

The EDUCAUSE CIO Constituent Group Listserv
January, 2011

I think dimdim's purchase highlights the value of developing an assessment model for open source projects: the technologies, licensing, costs and, just as importantly, the governance.

The EDUCAUSE CIO Constituent Group Listserv
January, 2011

A CIO's Perspective on Open-Source Software,
Mark Driver, Gartner, January 2011

The presence of open source is inevitable within mainstream mission-critical IT portfolios.

OSS assets can affect IT initiatives in positive and negative ways through gains or losses in such things as efficiency, productivity, functionality and security.

The principal risks of open source are driven by unmanaged software assets that can introduce technical and legal challenges (e.g., security, intellectual property management and audit compliance).

The IT benefits of open source are driven by a confluence of cost optimization, flexibility and innovation when managed properly.

Above all other considerations, the successful execution of an open-source governance program drives the difference between positive and negative impact.

The CIO's office is uniquely qualified to sponsor a corporate governance open-source program, enforce it within the boundaries of IT and promote it across business units as well.

The 2-3-98 Project:
Awareness, Not Advocacy

The first symbol represents the symbol "data" from a flowchart diagram indicating our interest in collecting evidence to support openness

The "Process" symbol represents our efforts to understand the issues

Finally the "Decision" shape signifies the goal: to help folks make decisions around openness
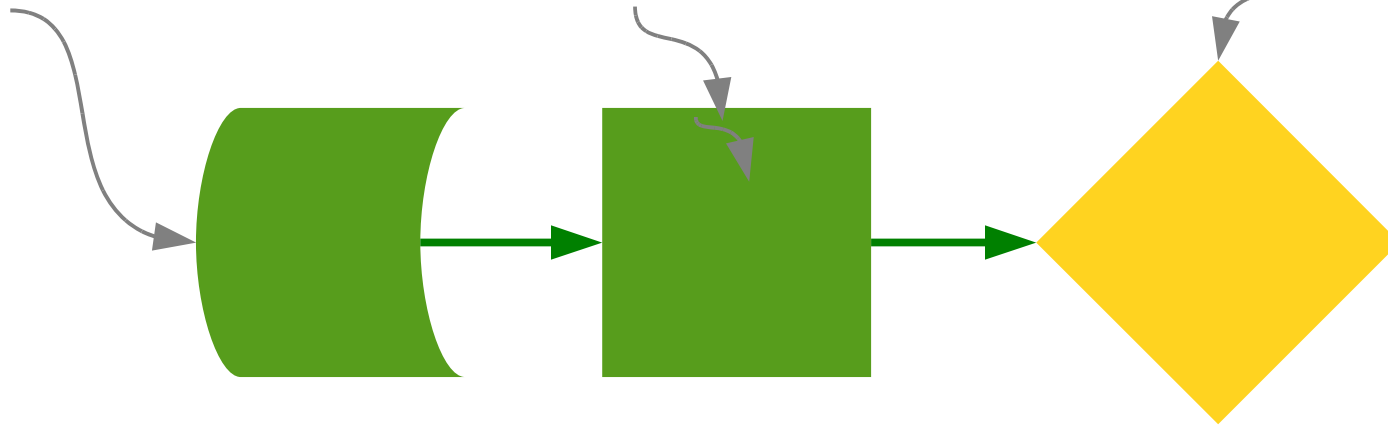
History

- 2-3-98 began in 2008 as a conference on the adoption of open source within higher education in response to traditional obstacles encountered within the State University of New York system.

- Conference topics included: Bedework, ESUP Helpdesk, Drupal, Linux Desktop, Moodle, Sakai, uPortal

- Tracks on "Quality," "TCO," "Support," "K-12 & H.E."

- 170+ participants

- Jim Farmer, Brian Hutzley, Jonathan Markow, Theresa Rowe, Gary Schwartz, Brian Stewart, Bob Sutor, Joseph Ugoretz

Who is going to be discussing the downside of Open Sourcing? This presentation looks more like an open source love fest than a discriminating look at Open Source as a solution. I know there are people who have tried Open Source and failed out there. You should at least have one on the agenda. Understanding the value and risk of Open Source is probably more relevant than describing how it worked for any one institution. Open source cost savings statistics are usually very direct and do not take into consideration all the indirect costs. Without someone representing the other side of the coin, it starts to feel like I am watching a carefully scripted advertorial for Open Source.

The EDUCAUSE CIO Constituent Group Listserv,
Aug 9, 2010

Charter

The 2-3-98 Project provides support for college and university administrators, managers, and practitioners wishing to take advantage of both openness, as an organizational and operational orientation, and open initiatives, in order understand, and thus increase, choices.

Goals & Rationale

- Offer a forum for open and honest discussion with peers about the evaluation, procurement, decision-making, issues, and experiences behind the adoption of, and barriers to, open source projects and other open initiatives

- Understand the common attributes associated with "open" as a development methodology and community of practice

- Identify issues associated with open projects, communities and practices (strengths, weaknesses, benefits, risks), in order to assist organizations in their assessment of both open products and processes

- Document best practices for success in the implementation of openness within technology, program or organizational development

- Promote shared findings through a community of interest

Do open projects have all the "developers" they need?

- Who is developing the technology?
- Who is cultivating community?
- Who is raising awareness?

Current Activities (uh, wish list)

- **Edu2ools (Based on WCET's EduTools)**
  1. Reduce discrepancies in evaluation criteria between open source and commercial applications;
  2. Remove institutional procurement requirements that bias toward RFP responses (which ignore open options); and
  3. Focus on functionality rather than features, a catalog of user stories and testing scripts will be generated for various academic technologies.

- **Guide to Acquiring Open Source Solutions**
  In a response to inquiries, Who Is Using Sakai & Moodle, Michael Korcuska, former Executive Director of the Sakai Foundation offered, "A 'Guide to Acquiring Open Source Solutions' for the education procurement departments would be a great deliverable for the two communities to collaborate on."

Current Activities (uh, wish list)

- **OpenBRR**

  Open Business Readiness Rating (OpenBRR) enables the community (enterprise adopters and developers) to rate software in an open and standardized way. OpenBRR will give evaluators a trusted, unbiased source for determining whether the open source software they are considering is mature enough to adopt and how different options may align (or conflict) to local needs.

- **Openness Maturity Model**

  Work sheet to assess the maturity of openness in an organization and provide a road map for further adoption.

- **Open Road Report**

  I. What's happened in the last year in Openness?

  II. What is going to happen in the next year?

  III. What are the areas of need related to the above for 2-3-98 development?

Edu2ools

- Barriers to evaluation, and thus adoption:
  - Evaluations based on features: features are technical;
  - Evaluations based on information gathered from RFP responses;
    - "Column fodder"
  - Without a license to sell, no need for marketing and promotion;
  - Communities focused on development efforts.

Edu2ools

- User stories:
  - Describe what a system can do, not what it has.
  - End-users, technologists, commercial affiliates.
  - As a [stakeholder], I want to [scenario],
    so that I can [test condition].
- Testing scripts
  - Set of instructions for assessing functionality;
- Currently have 300+ user stories from 8 campuses
- Testing scripts from Blackboard Learn 9.1, Desire2Learn, Instructure Canvas, Moodle*, Pearson e-College, Sakai*

* in development

Edu2ools

- Benefits
  - Removes bias toward commercial solutions through RFP processes
  - Testing scripts can be used for training and documentation
  - Continually updated based on new niche programs, learning styles
  - Comparative techniques (e.g. LMS teaching/learning styles),
  - User stories are persistent, features are not
  - Functional requirements gathering for all
  - **Raises awareness, education and peer evaluation**

Edu2ools

- "...there are also many ways to contribute to great software other than by programming."

  - Brad Wheeler, EDUCAUSE Review, 2007

  - Creating documentation, training, usability

  - Testing documentation and usability

  - Pecha Kucha: Contribute user stories and testing scripts through user groups and at meetings and conferences

"Developer" Community

- Blackboard
- Jasig
- JISC/CETIS
- NERCOMP/EDUCAUSE
- Sakai
- University of Massachusetts, UMassOnline
- WCET

Openness

- Learning Management Systems
- Help Desk Ticketing Systems
- e-Portfolios
- Content Management Systems
- Portals, etc.

Extending Open

- All open initiatives: focusing on the value of openness not the projects, initiatives, applications or technologies.
  - Open source software
  - Open educational resources
  - Open access/content/journals/research

Do we need 2-3-98?

- Which Jasig sessions should your campus CFO/CIO/CTO attend?
  "National bring your boss to work day"

- How did you find out about your project and others?

- Who in your project responds to campus strategic, financial, operational policy and/or implementation issues?

- How many RFP's has CAS, Bedework, uMobile or uPortal responded to?

- Can you name an equivalent to CAS? Drupal? Fedora? Mahara? Sakai? uPortal? WordPress?   …and 2-3-98?

Birds of a Feather

Waverly: 10:00 – 11:00
(Actually, 10:45 – I need to catch a flight!)

A bit about our "development" methodology and extended community

How can we raise awareness and participation in Jasig and within Jasig projects?

What should we be doing to promote the awareness, education and non-bias evaluation of academic technologies?

Thanks!