Sakai Foundation Status Report

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June 12, 2007
Sakai in one Slide....

- Collaboration, Teaching, and Learning
- FOSS - 100% free to use, modify and contribute
- Sakai is 3 years old
- Non-profit Sakai Foundation January 2006
- Financial support from 100+ Higher Education, 15 companies
- Six paid staff members
- 100+ people developing and testing Sakai releases

Overview Video: [http://www.dr-chuck.com/media.php?id=64](http://www.dr-chuck.com/media.php?id=64)
Membership Levels Over Time
The Ecology of Sakai
Mission Statement

• The mission of the Sakai Foundation is to hold ownership of the Sakai software and to guide and nurture the community of activity around the Sakai software. The Sakai Foundation seeks to maximize the positive impact of the Sakai software, technology, and community on teaching and research.
Objectives

• Release High Quality and Highly Usable Software
• Clearly communicate with the public and members about Sakai.
• Work to maintain a healthy, committed, and diverse community around Sakai
• Improve the global adoption of Sakai across teaching, research, and other collaborative applications.
• Work with other organizations to improve the overall state of collaboration and teaching and learning.
Guiding Principles

- Meritocracy
- Coalition of the willing
- Distributed decision making
- Local priorities lead to global results - "scratching an itch"
- Public discourse - E-Mail preferred
- Community involvement
- Flat hierarchy - peers - mutual respect

- The lack of formal power structures in
- Rough consensus - then move forward
- Destiny determined by those most affected
- Organizations that contribute resources influence direction
- Validate direction through the adopters
Stakeholders

- Adopting organizations
- CIOs
- Developers - IT professional and independent
- Teaching and Learning Professionals
- Teachers
- Students
- Collaborative users
- Companies who utilize Sakai Technology
- Companies with "competitive products"
Requirements Process

• Mark Norton is Requirements Coordinator
• Used to collect requirements across the community
• Process runs once for each major release
• Requirements “roll over” from one phase to the next
• Continuous gathering of feature requests
  – Gathering and entering feature requests
  – Users, Developers, Technical Support Staff
• Facilitated process to review, understand, document and prioritize requests into “requirements”
• High level “directions” document produced to give community summary information.
Sakai Requirements (Sample)

- REQ-282 Users should have more information and control over site import
- REQ-26 Emails Should Contain Site URL and Item URL
- REQ-173 Chat should allow users to search for messages from a particular user
- REQ-159 Graphical content in rich text editor
- REQ-65 Email Archive should be deep-linkable/bookmarkable
- REQ-375 Timed Release of documents/files in Resources tool
- REQ-109 Search across site and sites
- REQ-124 Add SCORM Player to Sakai
- REQ-129 Support for Learning Design and other Work Flow Engines
Initial Community Priorities
Summary for 2.4

• Assessment
• Migration
• Portfolio
• Course Management
• Statistics and Collection
• Grade book and Grading Service
• User Interaction
• Support SQL Server
• Resource Tool Improvements
• Mail Tool Improvements
• SCORM
http://issues.sakaiproject.org/confluence/x/f3

This document summarizes a number of requirements areas proposed for development in the Sakai 2.4 release (May 2007). This document has an estimated release date of Nov. 15, 2006 to the Sakai development and design community.

Methodology

1. Identify important areas of needed development based on past polling and other inputs.
2. Collect requirements and refine them.
3. Summarize and promote work to be done for Sakai 2.4.

Requirement Areas

Assessment

A collection of requirements related to assessment has been collected at http://issues.sakaiproject.org/confluence/x/d3.

Work on the Samigo assessment engine and user interface breaks down into the following areas:

- Performance improvements
- Reliability improvements
- Modularization
- Feature requests

An effort is already in progress to address performance, reliability, and modularity with a refactorization of Samigo software and a UI re-write. Unicon has been asked to conduct a performance review of the existing and new code that will lead to release decisions for Sakai 2.4. Feature work may be complicated by dual code bases. The following features have been requested and are unstaffed at this time:
Project Coordination

• Peter Knoop is Project Coordinator
  – Charged with communicating and tracking progress on bugs and requirements

• Tracking and communicating amongst volunteer developers
  – 29 Discussion and Working Groups
  – 89 Teams - Full Release
  – 10 Teams - Provisional
  – 18 Teams - Contrib

• Project Management Meeting - June 9 - Amsterdam

Coordination Video: http://www.dr-chuck.com/media.php?id=76
Development Structure

Sakai Foundation

Sakai Paid Staff
Sakai Volunteers

K, Inc

U of Z

J, Inc

U of Y

U of B

U of X

U of C

All of the Sakai developers, designers, and QA are working for Sakai as volunteers.
Sakai Community Size - www.ohloh.net

- **Core Sakai**
  - 900,000 Lines of Code
  - $13 million dollars of investment
  - 53 Volunteer Developers

- **Contrib**
  - 800,000 Lines of Code
  - 47 Volunteer Developers
  - $12 million dollars of investment

Project Coordination to Produce a Release

Sakai (product)

Framework
Samigo
Web Services
Schedule
rWiki

Blog
O.S.P.

Committer
Foundation Staff
Project
Provisional Project
Contributed Project

Release

June 2007 - DRAFT
<table>
<thead>
<tr>
<th>Issue</th>
<th>Description</th>
<th>Date</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicker Registration [clickerreg]</td>
<td>The Clicker Registration is for students to register their Clicker ID's in courses that use them.</td>
<td>27-Oct-2006</td>
<td>Project created in Contrib area of Sakai's SVN.</td>
</tr>
<tr>
<td>Evaluation System [evaluation]</td>
<td>Give formative evaluations to students in their courses and review the results.</td>
<td>17-Nov-2006</td>
<td>Project added to Contrib.</td>
</tr>
<tr>
<td>JForum [Not in SVN]</td>
<td>JForum Discussion &amp; Private Messages offers industry-standard discussion functionality to users.</td>
<td></td>
<td>Currently in separate cycle from MGT.</td>
</tr>
<tr>
<td>Goal Management [syracuse/gmt]</td>
<td>Our tools enable users to create activities, goal sets containing goals, and links from activities to goals within various contexts.</td>
<td>01-Oct-2006</td>
<td>Released version 0.7.0, running on Sakai 2.2.2. There will also be a tagged maintenance release with additional support for Sakai 2.3.</td>
</tr>
<tr>
<td>I10n-stats [loil/I10n-stats]</td>
<td>Tool for analyzing the status of the Sakai translations in the source repository.</td>
<td>04-Oct-2006</td>
<td>Newly formed contrib project.</td>
</tr>
<tr>
<td>Iconservice [asu/iconservice]</td>
<td>The iconservice provides a way to define sets of icons (aka theme packs), these theme packs allow us to have a consistent interface while</td>
<td>30-May-2006</td>
<td>The iconservice as it stands in iteration 1 does almost everything the author actually currently needs it to do. Future planned work includes finding ways to change the theme pack used at runtime, possibly based on user config data (first thought being to</td>
</tr>
</tbody>
</table>
Quality Assurance

• Megan May is QA Director
• Coordinates 60+ QA Volunteers - often technical support staff at adopting institutions
• Full QA of major and minor releases
• Reports to the Sakai Community and Board for each release
• Significant transition in Sakai QA approach since 2.0
  – QA drives release process and makes the final call
  – Significantly broadens community involvement in release in general
Community Communication

• Anthony Whyte is Community Liaison
  – Foundation questions
  – RFQ Help
  – Security Officer

• Mary Miles - Membership Coordination

• Web / Communication Team
  – Susan Hardin
  – Margaret Wagner
Security Procedures

• Security bugs reported directly to security officer
• Security WG Only
  – Threat/priority assessed
  – Security JIRA filed
  – Patch developed and QA
  – Patch distributed to known sites
• Public Process
  – Public announcement of the *existence* of a bug
  – Informal polling of patch deployment
  – Check into source tree
  – Maintenance release
Sakai Web Site

- Susan Hardin is leaving as Sakai webmaster
- Add static content into Sakai instance running at UHI over next 30 days.
- Anthony Whyte will act as interim web site coordinator
- Web site BOF - (need to schedule)
Donated Staff

- Lon Raley - Finance - Michigan - 50%
- Pam Dietz - Finance/Support - Michigan - 50%
- Tony Atkins - Server Support - UHI - 20%
- Duffy Gilman - Server Support - Univ. Arizona - 20%
- Margaret Wagner - Newsletter/Web - Michigan - 20%
- Andrew Poland - Server Support - Indiana - 30%
Coordination Paid Staff

- Charles Severance - Executive Director - 100%
- Mary Miles - Membership Coordinator - 100%
- Anthony Whyte - Community Liaison - 100%
- Peter Knoop - Project Coordinator - 80%
- Megan May - QA Director - 50%
- Mark Norton - Requirements Coordinator - 15%
- Susan Hardin - Web Master - 25%
Foundation Finances
Financial High Level

• Converting partner contracts from UM to SF
  – Going very well
  – Net increase in members

• May 2007 Reserves
  – $291K(SF) + $158K(UM) = $449K

• Data provided by Lon Raley (UM), Pam Dietz(UM), and Mary Miles(SF)
Financial Outline

- History
- Transition to independent Foundation
- Financial Summary - 2006
- Conference Finances
Finance History

- Sakai Project @ Michigan
- Sakai Foundation
- Overlap / Transition
- Foundation Financial Flows
Financial History

Sakai Project

2004

2005

2006

2007

2008

Sakai Foundation

Membership Transition

Foundation formed October 2005
Sakai Project (2004 - 2005)

Mellon Foundation

Sakai Project (UM)

Michigan Indiana Stanford MIT

Hewlett Foundation

Sakai Partners

Sakai Partners Program (UM)

Partner Conferences

Partner Staff

June 2007 - DRAFT
Early Transition (2006 - 2Q07)

- Sakai Partners
- Sakai Foundation
- Sakai Partners Program (UM)
- Partner Conferences
- Foundation Staff
- Renewals

June 2007 - DRAFT
Late Transition (3Q07 - 2Q08)

- Sakai Partners
- Sakai Partners Program (UM)
- Sakai/UM Account
- Foundation Staff
- Partner Conferences
- Renewals
- Transfer
- Sakai Foundation
- $$
- $$
Transition Complete (2Q08)

Sakai Partners Program (UM) Complete

Sakai/UM Account

MOU

Sakai Foundation

Partner Conferences

Foundation Staff

Sakai Partners

$$
Steady State (3Q08 and on)

Some expenses will be paid directly by the Foundation and other expenses will be handled through Contracts/MOUs with other organizations.

Org A MOU Sakai Foundation MOU Org B

Partner Conferences Foundation Staff Other Expenses Foundation Staff
Overall Finances 2006
Sakai Combined Expense By Expense Type
Calendar Year 2006

People -485,023
Services -431,058
Travel & Related -61,498
Registration / Sales -14,713
Supps & Exp -13,121
-1,005,413
Conference Finances
Vancouver Expense Breakdown

$276,637

- Staff: $29,238.57
- Hotel: $209,983.70
- Swag: $7,216.00
- Printing: $11,881.44
- Travel: $8,399.95
- Misc: $9,917.52
Austin Expense Breakdown

$132,678

- Hotel: $102,193.60
- Swag: $6,805.00
- Printing: $2,755.35
- Travel: $7,014.71
- Other: $13,909.35
**Atlanta Expense Breakdown**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
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<tbody>
<tr>
<td>Food &amp; Beverage</td>
<td>$149,761.32</td>
</tr>
<tr>
<td>A/V</td>
<td>$39,474.02</td>
</tr>
<tr>
<td>Rooms</td>
<td>$6,686.1</td>
</tr>
<tr>
<td>Printing</td>
<td>$7,342.1</td>
</tr>
<tr>
<td>Coordination</td>
<td>$3,274.41</td>
</tr>
<tr>
<td>Wireless</td>
<td>$34,900</td>
</tr>
<tr>
<td>Travel</td>
<td>$2,200</td>
</tr>
<tr>
<td>Staff time</td>
<td>$2,300</td>
</tr>
<tr>
<td>Program Chair</td>
<td>$10,000</td>
</tr>
<tr>
<td>Swag</td>
<td>$4,500</td>
</tr>
<tr>
<td>Shipping</td>
<td>$2,000</td>
</tr>
</tbody>
</table>

Total Expenses: **$262,131**
Looking Ahead

• Try to accelerate member conversion from Michigan to Sakai Foundation
• Formalize UM/SF relationship into Memorandum of Understanding
• Amsterdam Conference will be the most expensive ever - 300K
• Possible move to one main conference per year - Board considering
Summary

- Foundation procedures, staff, approach are well-established
- Foundation runs itself
- Financial transition has many details but we have a plan which is well underway - complete 2Q08 or earlier
Executive Director Transition

• Please welcome Michael Korcuska