Response to Ian Dolphin's request for OSP Community input on the Sakai Jasig merger

On Thu, 25 Aug 2011 15:58:36 <janice.smith@threecanoes.com> wrote

Hello Ian

Thank you for your very kind letter inquiring about an OSP Community response to changes due to the merger of Sakai and Jasig. Since receiving your letter I have had the opportunity to speak with members of the OSP Community on two of our weekly calls. What follows is our joint response to your questions.

I understand that you are interested in input on two topics:

1. Thoughts about the new structures to be called Software Communities and Communities of Interest
2. Ways that the experience of the OSP Community merging with Sakai some years ago could inform the merging of Sakai and Jasig

First, we need to say that according to our understanding of the definitions of Software Community and Communities of Interest, we believe ourselves to be both a Software Community AND a Community of Interest. We are a Software Community in that we gather around a suite of interoperable portfolio tools in Sakai 2.x and a yet to be determined set of functionality in Sakai OAE, but we are also a Community of Interest that believes in the value of portfolios for teaching and learning, assessment, and personal representation. In fact, we are a subset of a much larger international portfolio Community of Interest as represented by such organizations and events as AAEEBL, ePIC, and EIfEL.

Given our dual identity as both a Software Community and a Community of Interest, it will be important for us to be able to continue to operate as both. Over-specification of the definitions of each type of community could pose a problem if we are somehow asked to choose. In fact, we think we are in pretty good shape in relation to both aspects of our identity. The synergy we have between the functional and technical aspects of what we do is a crucial part of why and how our community works. Sakai has specific ways of doing portfolios that require our ongoing technical support and vision for future development. At the same time, portfolios can mean a great many things and we need our functional leaders to steer a steady course within the broader portfolio community. The synergy of developers, who might be more drawn to a Software Community, and teaching and learning specialists, who might be more drawn to a Community of Interest, is vital to the ongoing well being of our OSP Community. Developers appreciate knowing how users respond to the software. Educators appreciate developers who are responsive to teaching and learning needs.

There are not many of the original OSPI folks left. Since the days when OSPI first organized, most people and some institutions have moved on in one way or another. One person in our community who had just signed onto OSP at the point when OSPI joined Sakai, said that just as OSP kept its own identity within Sakai, he would assume that Sakai and Jasig would each keep their own identities within the new combined organization. I am not aware of what the new organization of Sakai/Jasig will be called, but think the naming may be important. In the case of OSP and Sakai, OSPI dropped the "I" for initiative but kept the rest of its identity as a part of Sakai. In my opinion, this was good in that OSP retained many of its original values and purposes, but problematic in that the rest of Sakai pretty much ignored OSP for a good many years.

In the case of OSPI and Sakai, OSPI joined Sakai in order to piggy back on existing functionality that we needed and did not have the resources to build. I am not sure that Sakai as an organization saw as much value-add in merging with OSPI. There was a Mellon grant about that time that may have made Sakai look like it had more resources, but the money went to build OSP 2.0 in Sakai, not to build Sakai.

I think if I could do it over I would have tried to make sure the following happened during the Sakai/OSPI merger.

1. Provide as much transparency as possible about the merger, why it was happening, and how it would benefit both organizations.
2. Do more thinking about whether OSPI was just another "tool" being added to Sakai or whether the OSPI organization and community needed to be introduced and carefully blended into the new organization (Sakai clearly being parent, and OSPI child). (Looking back I think the rest of Sakai thought of OSP as just another tool rather than a community.)
3. Consider how the Sakai and OSP tool sets might better integrate and play together rather than assuming that portfolios would operate separately from courses and that only Resources would talk to both sets of tools.
4. Be aware of the contributions and skills of the various institutions and functional and technical leaders within OSPI and consider how they could be welcomed into Sakai to thrive within the newly merged organization.
5. Find ways to bring communities together in meaningful activity. Do more of what has happened more recently in Sakai by encouraging the Teaching and Learning Community (which really did not exist when Sakai and OSPI joined) and the Portfolio (OSP) Community to work more closely together in representing user needs to Sakai developers.
6. Be much more sensitive about how the political and financial variables involved could impact the OSP community (that community being the smaller and less privileged group in the merger).

There were some definite downsides of the OSPI/Sakai merger. One of them was that ultimately the University of Minnesota, which had contributed the original OSPI code, withdrew from Sakai. Minnesota was dependent upon a set of structured data elements that allowed and encouraged users to keep a lifelong learning record along with portfolios derived from it. Other players, specifically Indiana University and rSmart, were far more interested in assessment data and were focused on building OSP 2.0 in Sakai to enhance the collection of that data via the matrix tool. In the process, the structured data elements were sacrificed and Minnesota felt it had to use its own resources to continue its own branch of the original code.

As part of the process of building OSP 2.0, there was a thriving OSP Functional Requirements group that produced a lot of requirements (too many according to the developers). Unfortunately, it proved difficult to manage the requirement and design process and another one of the major players, DePaul University, left the project. The Mellon grant ultimately did produce the next version of OSP (which we still use) but as the grant continued, the process became more and more top down and less and less community-oriented. My sense is that a number of the lingering problems with OSP, in particular the reporting process, had their origins in the less than ideal start-up of OSP within Sakai. There was no one who was ill-intentioned, but there were too many conflicting styles and points of view and there was no one skilled in managing community process facilitating the project.

The same things that happened with the merger of Sakai and OSPI will not happen again with Sakai and Jasig, but anytime we try to merge one culture with another, there will be issues. As a long time international educator familiar with conflict between cultures, my vote is for careful consideration of issues, facilitation of differences, and transparency of process as Sakai leadership does their best to guide both communities into the formation of a new identity and a productive way of working together.

Thank you for reaching out and please call on me any time you think I might be of help to you.

Janice

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---- On Mon, 15 Aug 2011 03:07:08 -0500 **Ian Dolphin**<iandolphin@sakaifoundation.org> -wrote ----

Hi Janice,

I hope you are well. As I'm sure you're aware, Sakai and Jasig are at an advanced stage of discussion regarding a merger of their respective Foundations. If all goes well, this should complete early next year. Our mileage may vary of course, as this all has to be approved by the State of New Jersey and the IRS.

I wanted to raise two issues with you regarding the merger.

The first is to mention a little about how we intend to organize in the new Foundation. We're not intending to merge what we now know as software projects. uPortal will remain uPortal, Sakai CLE, Sakai CLE and so on. Our use of language will change slightly, and these will become known as Software Communities. The rationale behind this is simply making our use of language match the world outside open source a little better - a "project" being generally regarded as a defined set of objectives, resources and tasks etc. We'll still use the term project, but this will become tied to a particular release (eg Sakai CLE 2.9). This will take a little time to get into, but I hope will help us communicate with the folks we need to communicate with more meaningfully.

We're also establishing "Communities of Interest", distinct from Software Communities. These Communities are intended to be flexible and theme based. The theme might be very large - the Sakai Teaching and Learning Community being an example - or rather more narrow, "Mobile Access" being another example currently under discussion. The Community of Interest concept is designed both to bridge Software Communities, or (where necessary) be entirely separate from them. Over time, I regard them as a key component of the value of the merger.

Both Software Communities and Communities of Interest will be established through an incubation process which we're elaborating. This will be applied in pretty much a "checklist" way for existing projects.

I thought I should take the time to raise this with you, as I believe it has implications and benefits for the Portfolio community. All this, I hasten to add, is at a relatively formative stage, and the Sakai-Jasig Joint Working Group - the subset of both Boards who're working to make this happen - would very much welcome feedback. The proposed by-laws of the new organisation outline what I've tried to describe in thumbnail above in Article IX. I've attached a current draft for your convenience. These are currently out for community consultation.

The second issue I wanted to raise was really more of a request. You'll see, from the above, that we're not really speaking of a "merger" in the same way that OSP merged with Sakai, but I am interested in your perspectives on that merger with the benefit of hindsight. Anything of the OSP-Sakai experience you would be prepared to share with the Joint Working Group - and I'm completely comfortable with a "warts and all" here - would be very valuable as we chart our forward course. Please give it your consideration.

Best wishes

Ian
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