

Sakai Foundation Status Report

Charles Severance
June 12, 2007



Sakai in one Slide....

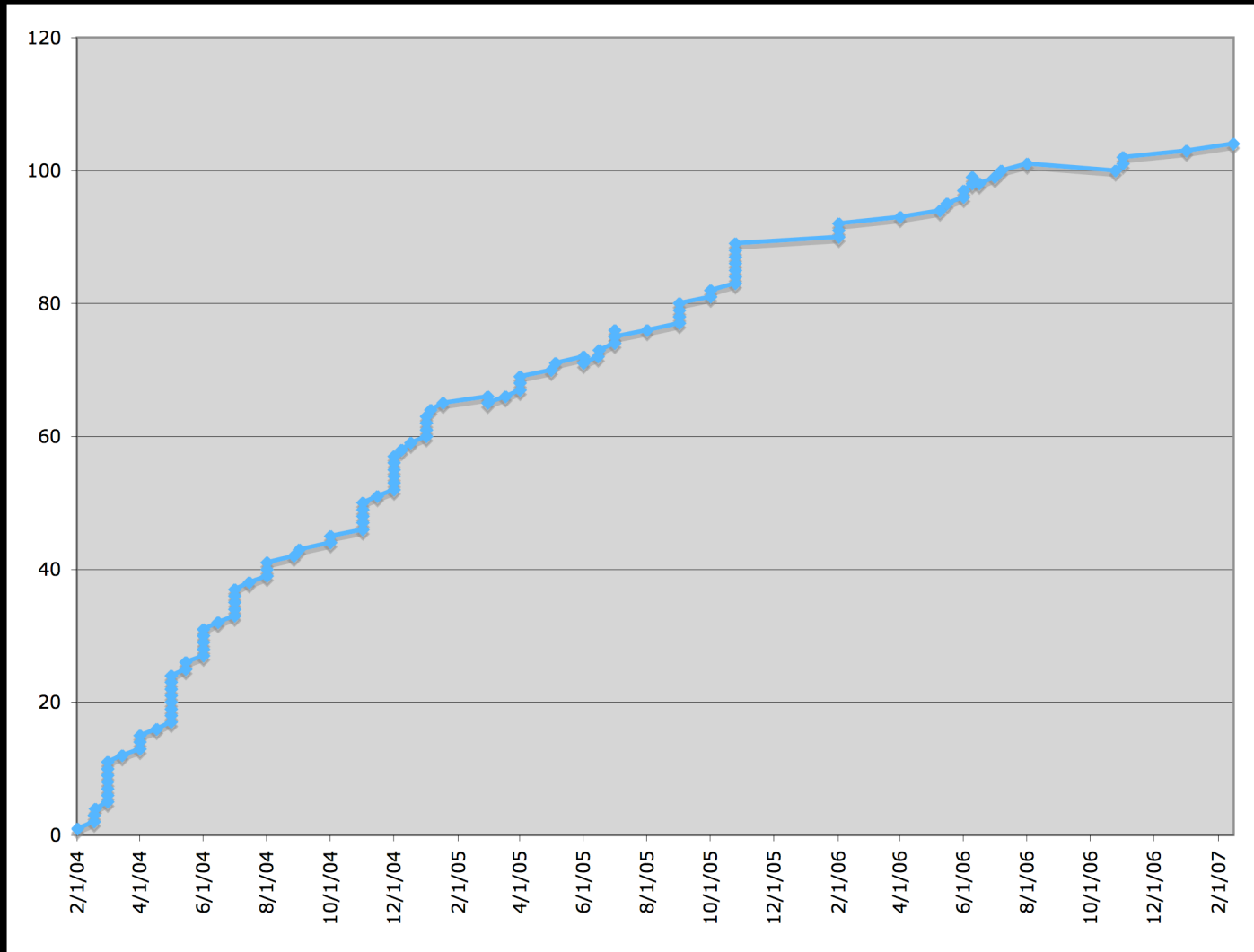
- Collaboration, Teaching, and Learning
- FOSS - 100% free to use, modify and contribute
- Sakai is 3 years old
- Non-profit Sakai Foundation January 2006
- Financial support from 100+ Higher Education, 15 companies
- Six paid staff members
- 100+ people developing and testing Sakai releases

Overview Video: <http://www.dr-chuck.com/media.php?id=64>



Sakai

Membership Levels Over Time



June 2007 - DRAFT



The Ecology of Sakai

June 2007 - DRAFT



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 as 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.

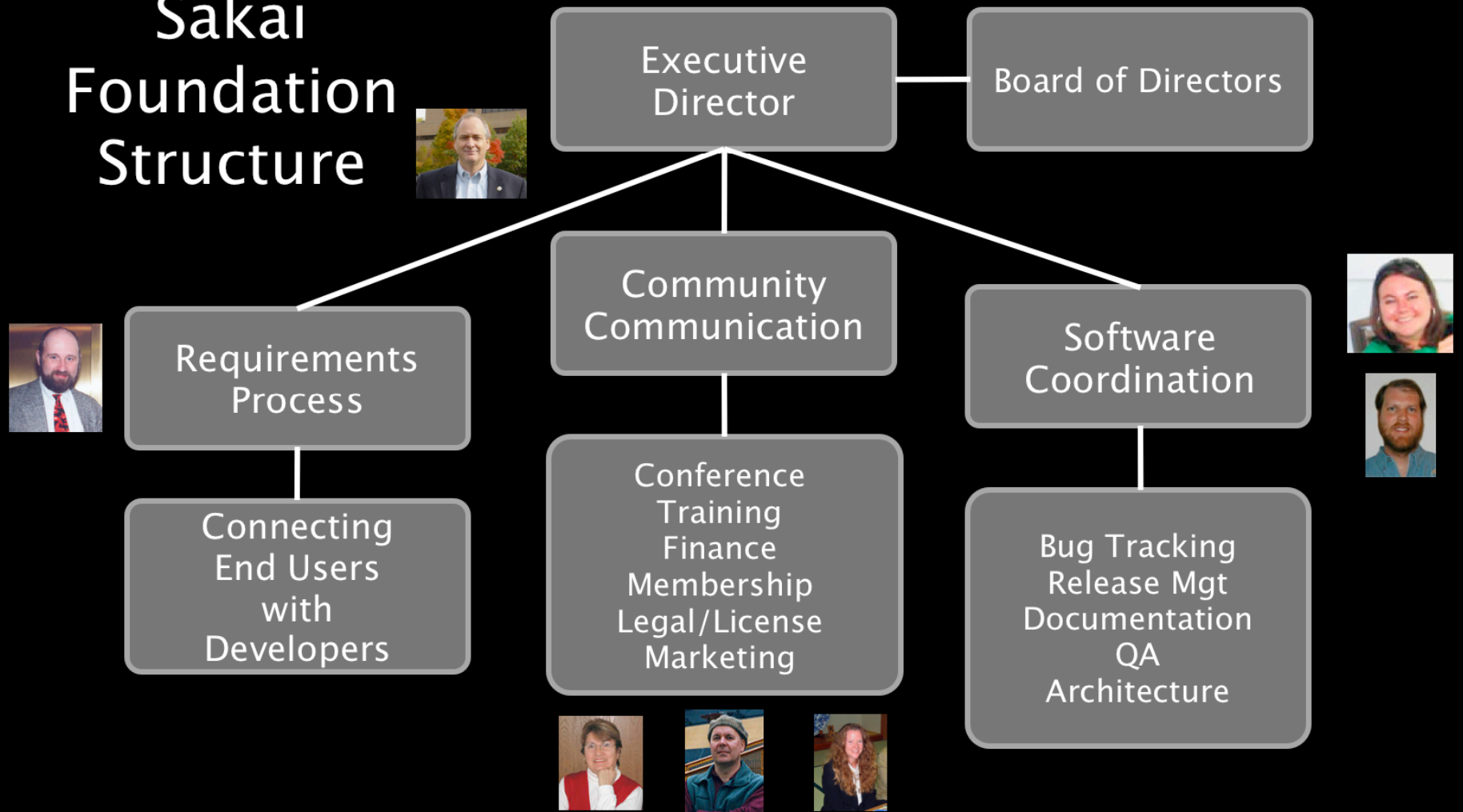
Guiding Principles

- 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"

Sakai Foundation Structure



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




Requirements Summary for Sakai 2.4 – WG: Requirements – Confluence

http://issues.sakaiproject.org/confluence/display/REQ/Requirements+Summa Google

Sakai Collab Bugs Confluence S:8080 Mambo Desiderata GVideo IMSTI Pluto GS DNS K12 CSU Devbox Gmail

Dashboard > WG: Requirements > ... > Work > Requirements Summary for Sakai 2.4 Search

 WG: Requirements Log In

Requirements Summary for Sakai 2.4

View Info <http://issues.sakaiproject.org/confluence/x/f3> Browse Space

Added by [Mark J. Norton](#), last edited by [Mark J. Norton](#) on Nov 20, 2006 ([view change](#))

Labels: (None)

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. Unicorn 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

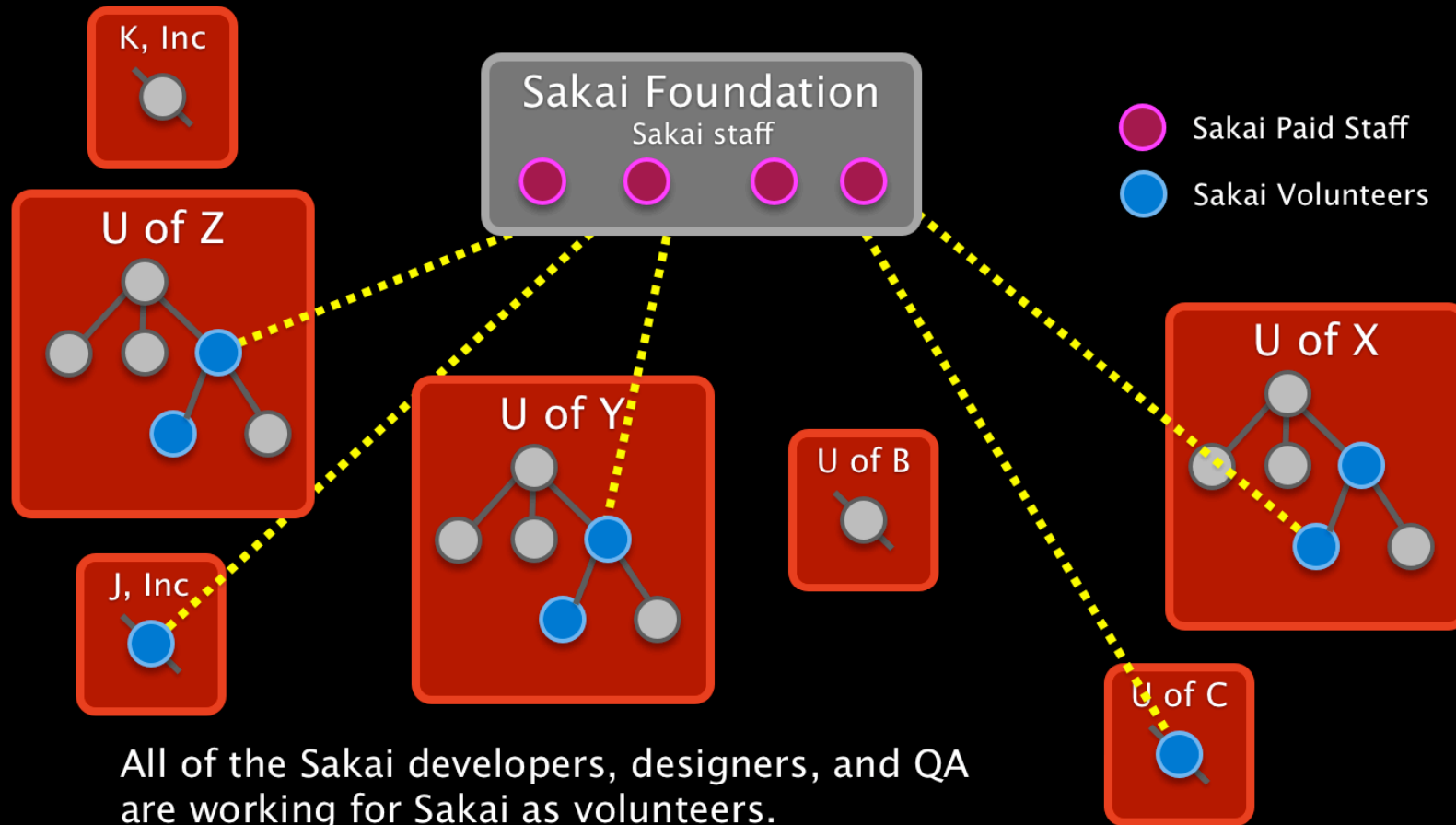


- Peter Knoop is Project Coordinator
 - Charged with communicating and tracking progress on bugs and requirements
- Tracking and communicating amongst volunteer developers
 - 29 Discussion and Working Groups
 - 89 Teams - Full Release
 - 10 Teams - Provisional
 - 18 Teams - Contrib
- Project Management Meeting - June 9 - Amsterdam

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



Development Structure



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

Sakai (core) popular
<http://www.sakaiproject.org/>

Sakai is an online Collaboration and Learning Environment. Many users of Sakai deploy it to support teaching and learning, ad hoc group collaboration, support for portfolios and research collaboration.

Sakai is a free and open source product that is built and maintained by the Sakai community. Sakai's development model is called "Community Source" because many of the developers creating Sakai are drawn from the "community" of higher ed institutions and commercial affiliates which have signed on as formal, fee-paying partners in the endeavor. Its direction and development are guided by member collaboration, while central resources are coordinated by a foundation and an elected board.

"Sakai (core)" represents the code that is included in releases. See also "Sakai (contrib)".
Licensed under Educational Community License.

[sakai](#) [collaboration](#) [learning](#) [community_source](#)

Ohloh Summary **Average Rating**
☆☆☆☆☆
(0.0/5.0)

Very large, active development team
Short source control history

42 Active Developers
Over the history of the project, 43 developers have contributed code. However, only 42 have done so in the last year.

ggolden@umich.edu 899 commits, 11 months contribution	bkirschn@umich.edu 445 commits, 9 months contribution
daisyf@stanford.edu 371 commits, 9 months contribution	ian@caret.cam.ac.uk 367 commits, 10 months contribution
chmaurer@upui.edu 327 commits, 9 months contribution	38 more developers...

Source Code
This project is enlisted in 63 repositories (see [details](#)). The source code repositories show that the project is 11 months old. The history of source code activity can be browsed [here](#).

Languages
Ohloh analyzes the project source code and determines the language of each line of code, excluding comments and blanks.

Java	56%
XML	18%
JavaScript	12%
HTML	11%
Other	

Licenses
Ohloh searches the source code for individual license declarations. These licenses can differ from the project's official license.

Educational Community License	3138 files
Apache Software License	389 files
GNU Library or "Lesser" GPL	240 files
BSD-ish License	3 files

Related Projects
[dotProject](#)
[Moodle](#)
[Sakai \(contrib\)](#)
[Subversion](#)
[XOOPS Dynamic Web CMS](#)

Project Cost
This calculator estimates how much it would cost to hire a team to write this project from scratch.

Codebase: 772,195 LOC
209 Person Years
\$ 55000 /year
\$11,482,505

Zenosis
up to the minute regulatory eLearning for global life sciences
www.zenosis.com

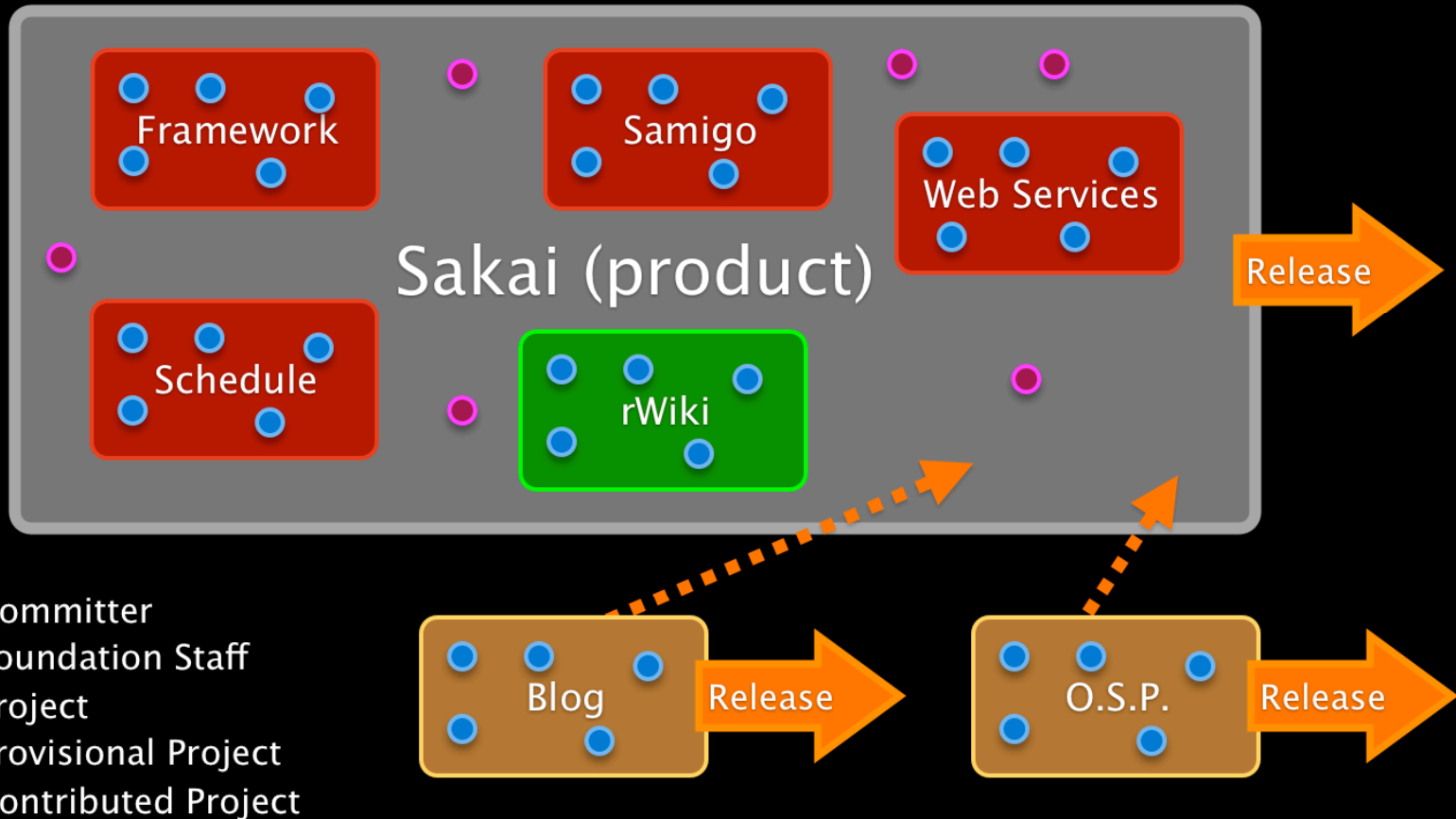
Data Warehouse enables
all your data to be actionable. Quick, simple and affordable.
www.Netezza.com

Help Desk Support Tool
Remote PC Control without install. Control PCs in 20 Seconds. Try Free
Rescue.LogMeIn.com

Developer Video: <http://www.dr-chuck.com/media.php?id=53>









Project Coordination to Produce a Release



Home - Management / Project Coordination - Confluence

http://issues.sakaiproject.org/confluence/display/MGT/Home

Sakai Collab Bugs Confluence S:8080 Mambo Desiderata GVideo IMSTI Pluto GS DNS K12 CSU Devbox Gmail

	Clicker Registration [clickerreg]	The Clicker Registration is for students to register their Clicker ID's in courses that use them.	27-Oct-2006 Project created in Contrib area of Sakai's SVN.	27-Oct-2006 Awaiting u from Proj Lead(s).
	Evaluation System [evaluation]	Give formative evaluations to students in their courses and review the results.	17-Nov-2006 Project added to Contrib.	17-Nov-2006 Awaiting u from Proj Lead(s).
	JForum [Not in SVN]	JForum Discussion & Private Messages offers industry-standard discussion functionality to users.	See http://etudesproject.org/iform.htm	Currently separate cycle from
	Goal Management [syracuse/gmt]	Our tools enable users to create activities, goal sets containing goals, and links from activities to goals within various contexts.	01-Oct-2006 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.	A maintan release of 0.7 will be with supp Sakai 2.3 additional planned.
	I10n-stats [loi/I10n-stats]	Tool for analyzing the status of the Sakai translations in the source repository.	04-Oct-2006 Newly formed contrib project.	04-Oct-2006 Awaiting u from Proj Lead(s).
	Iconservice [asu/Iconservice]	The iconservice provides a way to define sets of icons (aka theme packs), these theme packs allow us to have a consistent look for icons while	30-May-2006 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 run time, possibly based on user config data (first thought being to	Awaiting u from Proj Lead(s).

<http://issues.sakaiproject.org/confluence/display/MGT/>

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 Liason
 - 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

June 2007 - DRAFT



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)

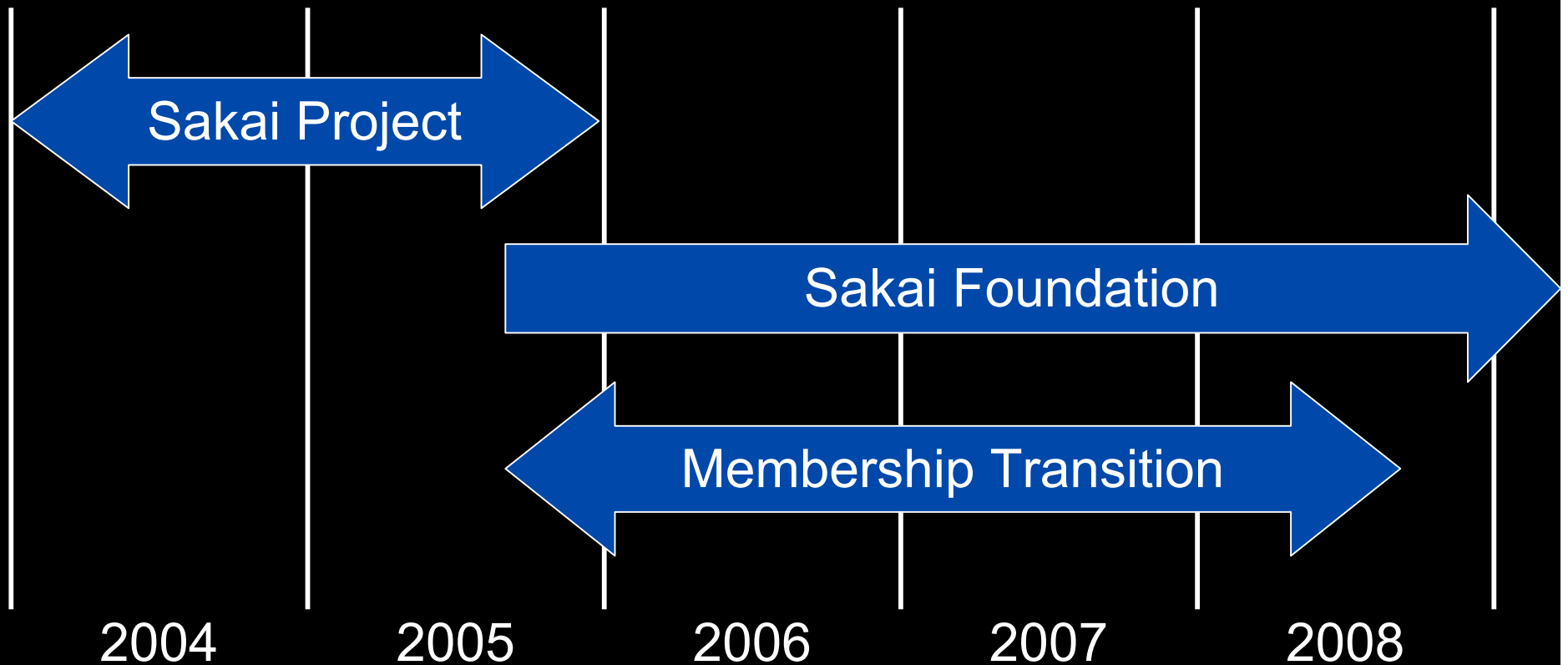
Financial Outline

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

Finance History

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

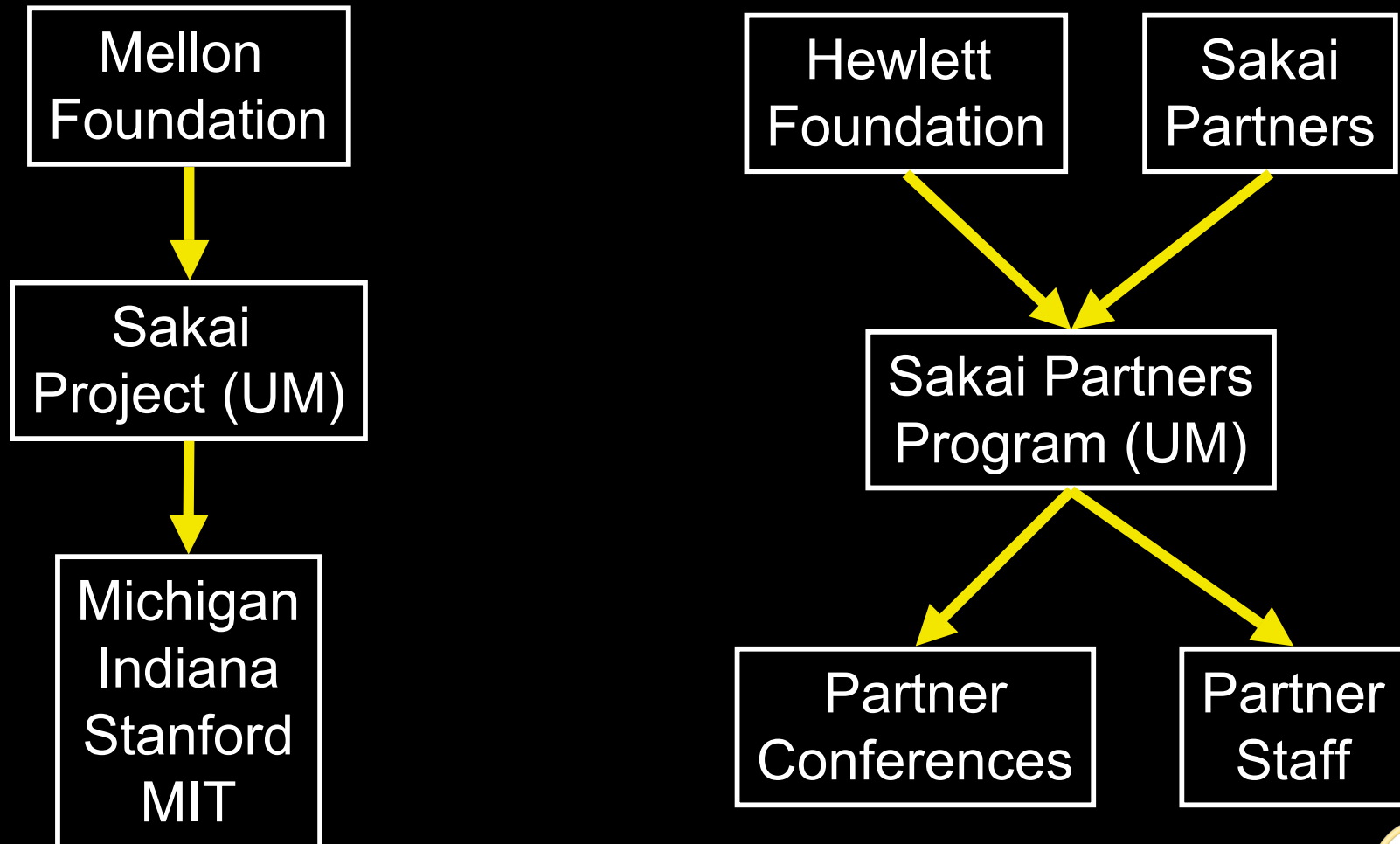
Financial History



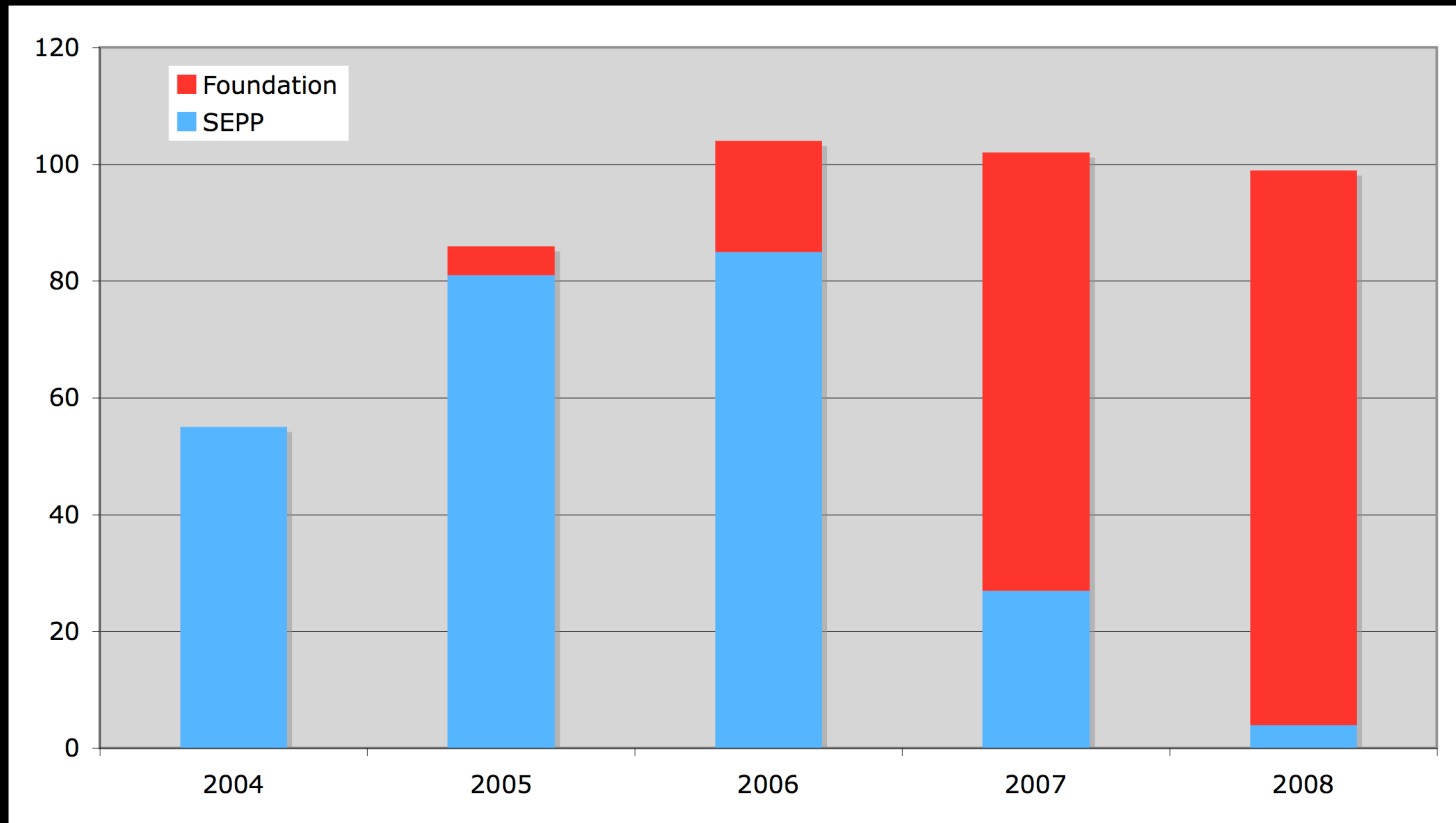
Foundation formed October 2005



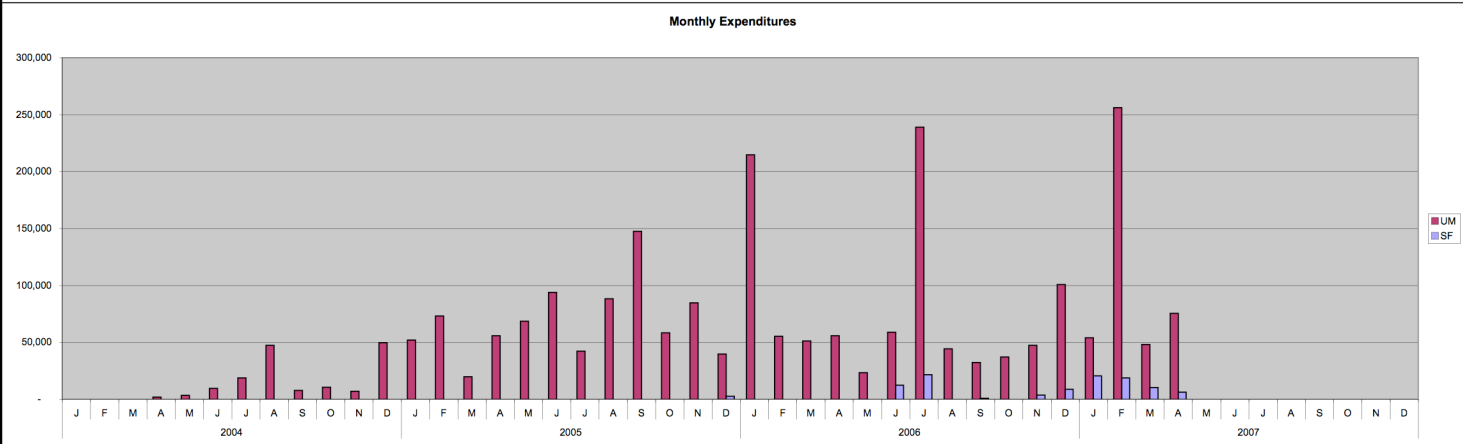
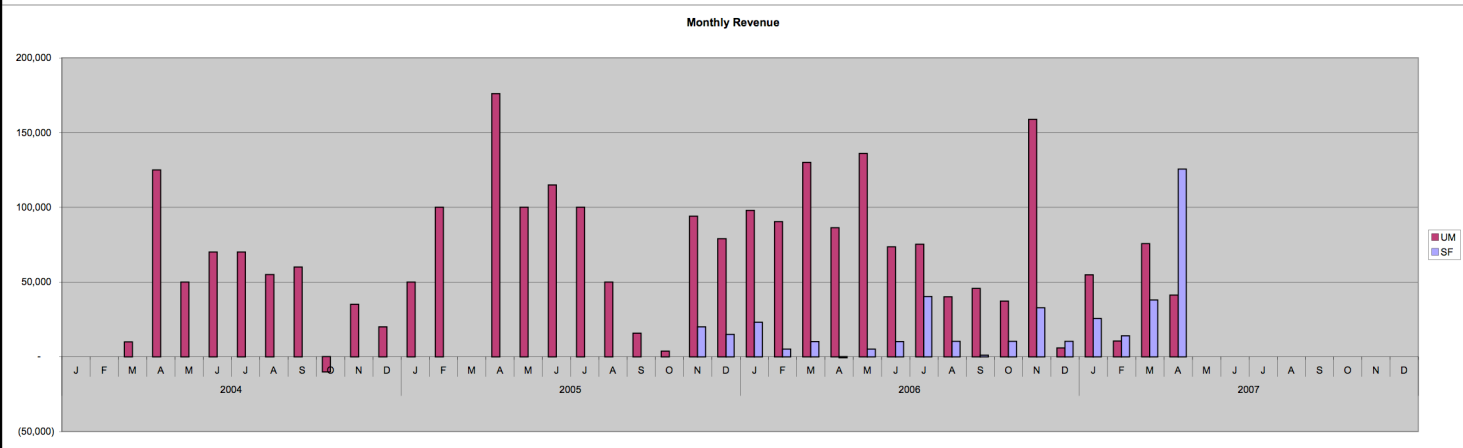
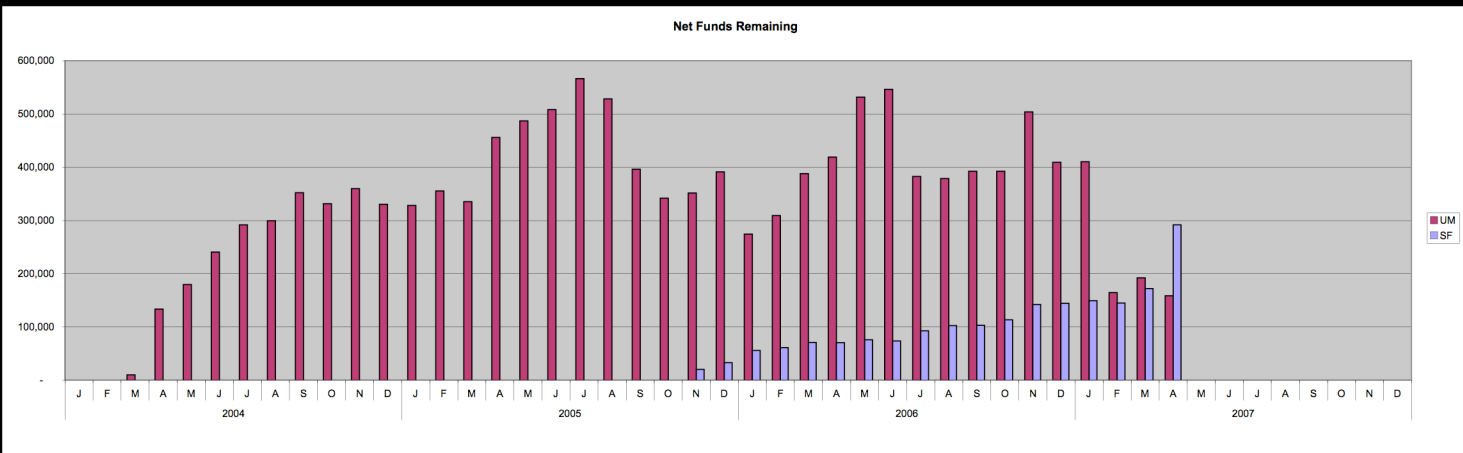
Sakai Project (2004 - 2005)



Membership Transition

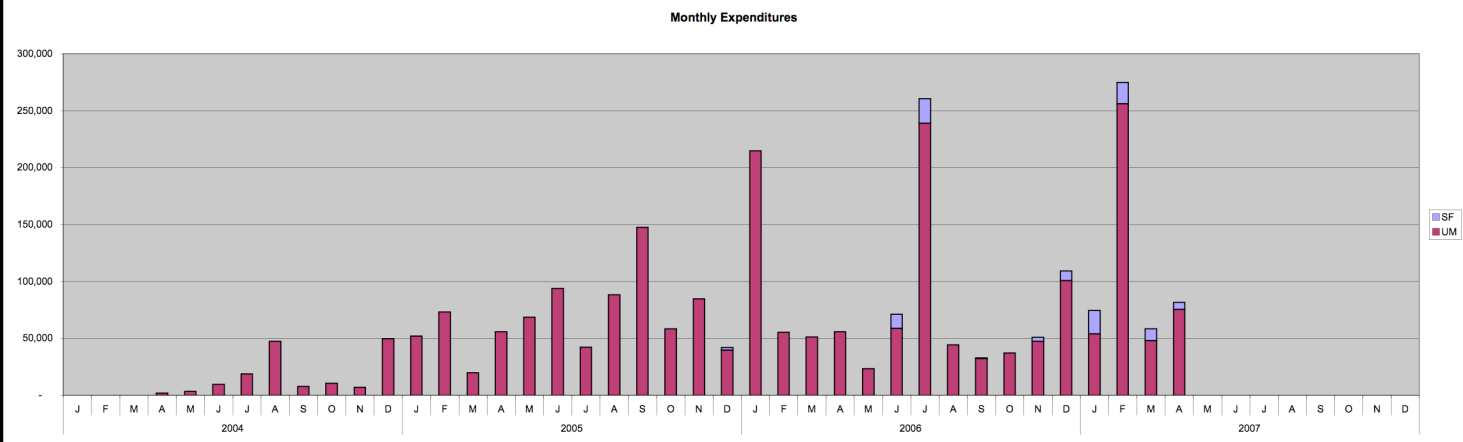
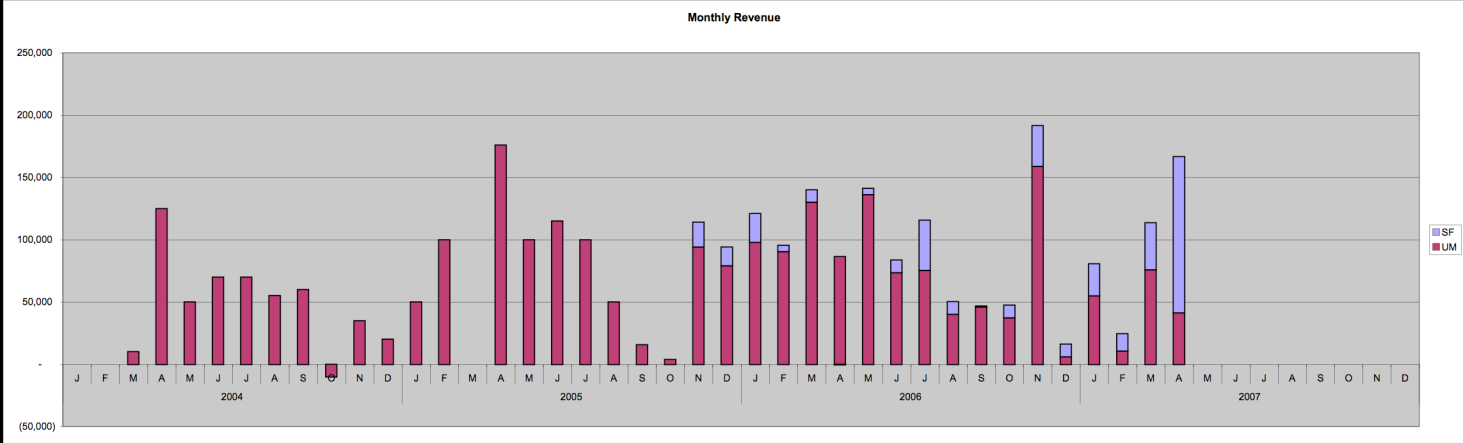
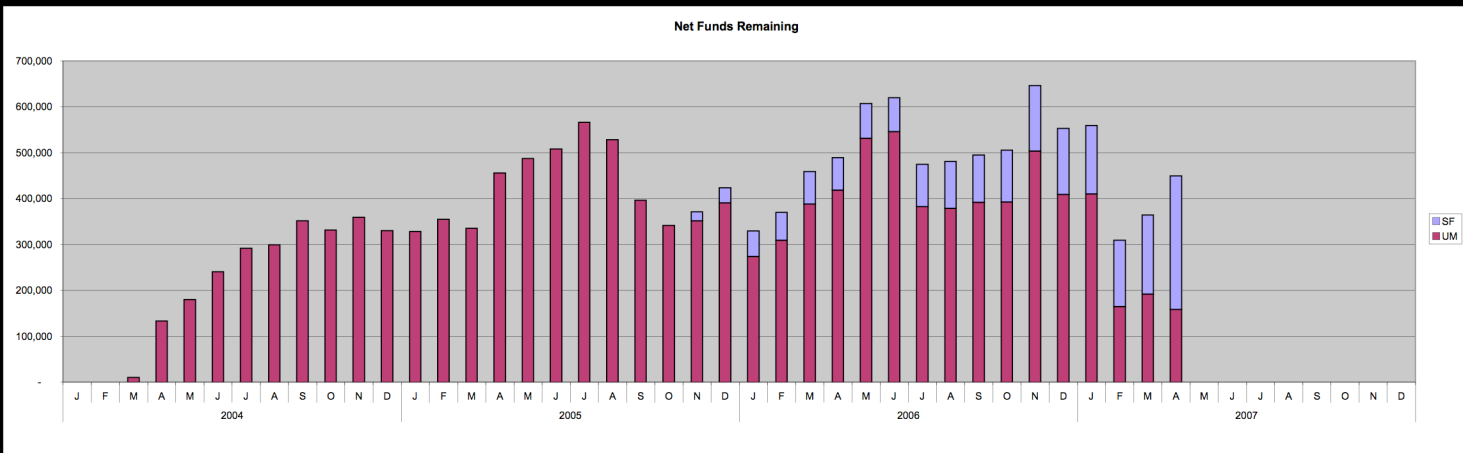


2006 8
1Q07 8
2Q07 6
3Q07 7
4Q07 2
1Q08 1



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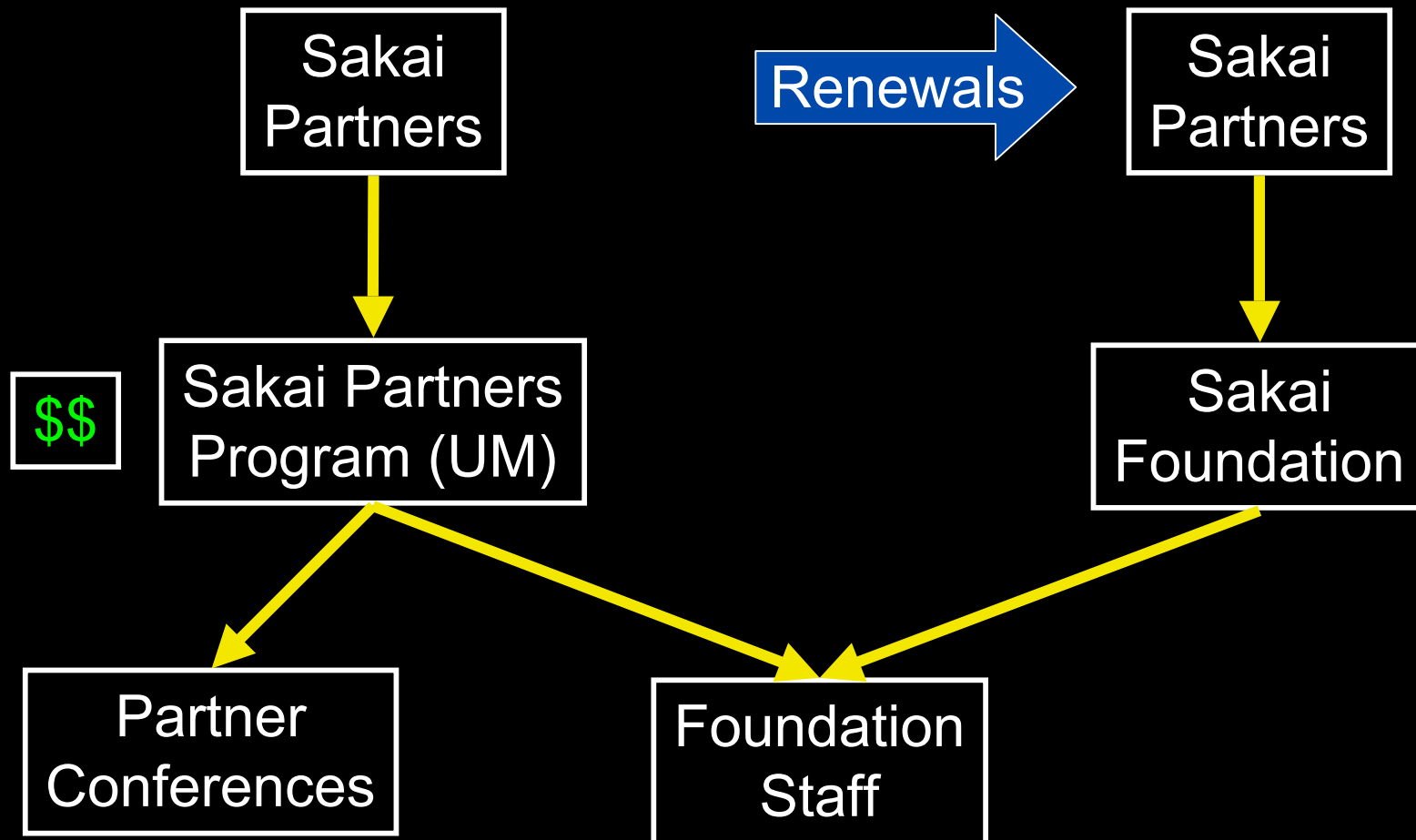




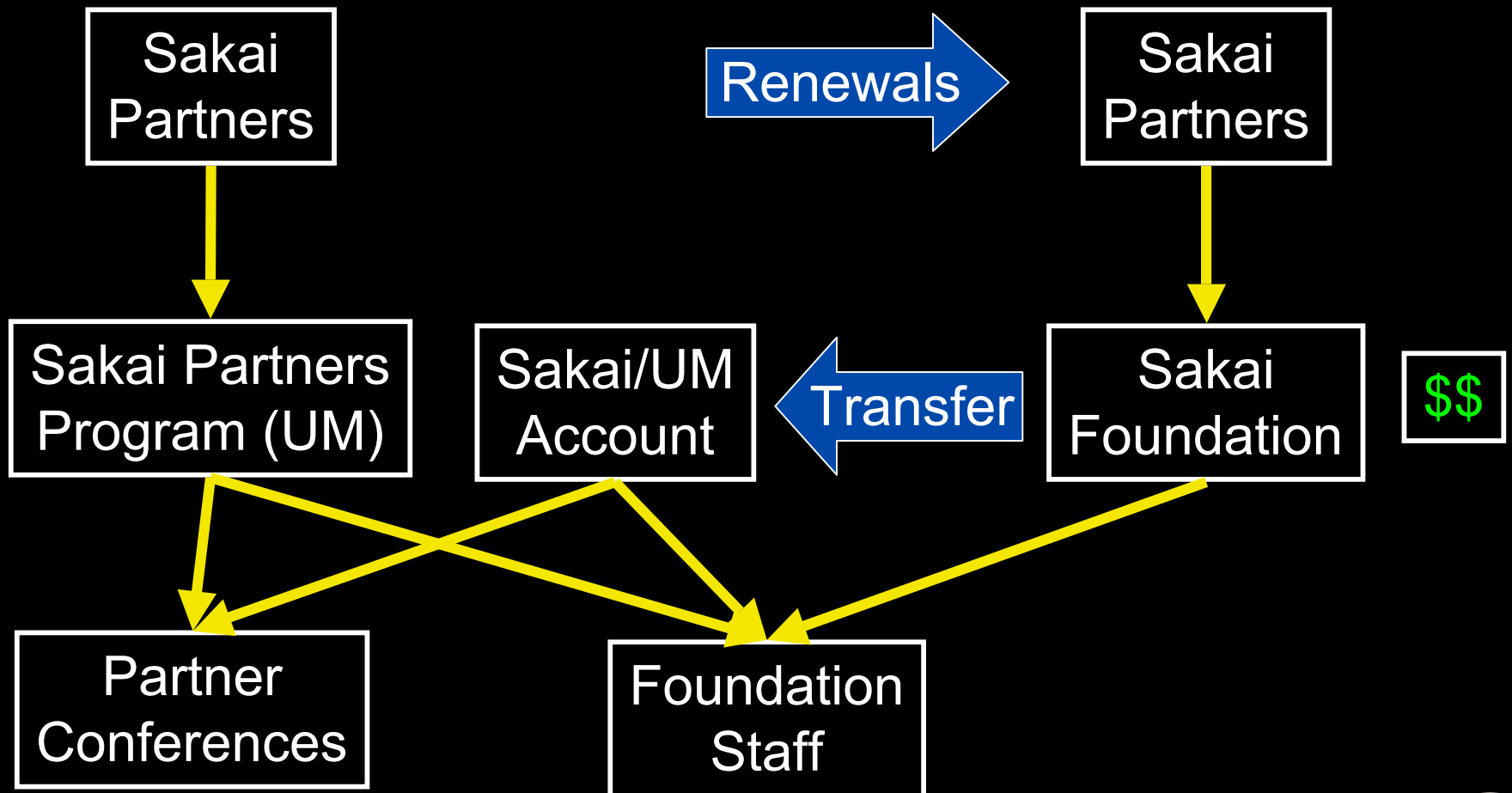
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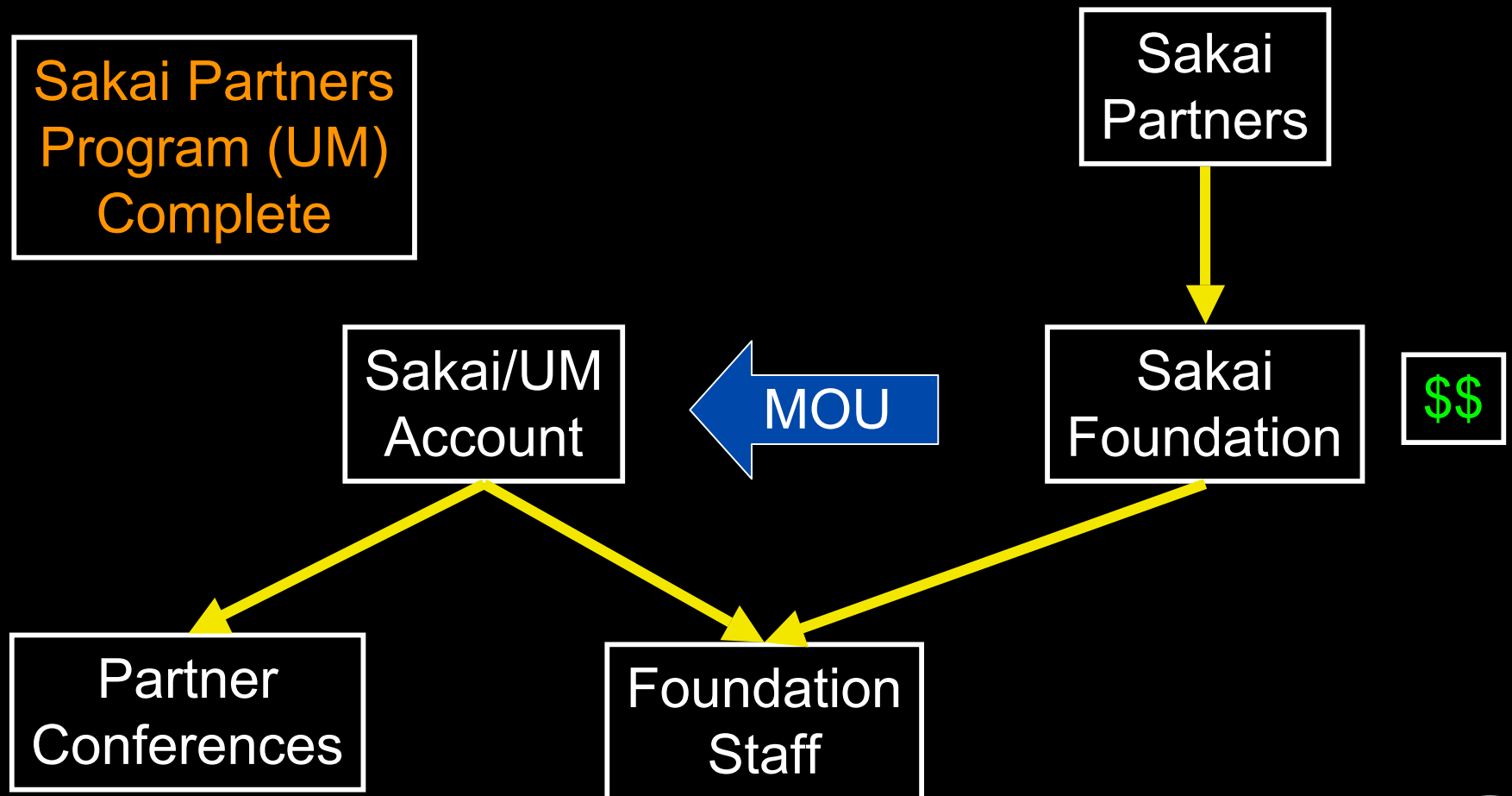
Early Transition (2006 - 2Q07)



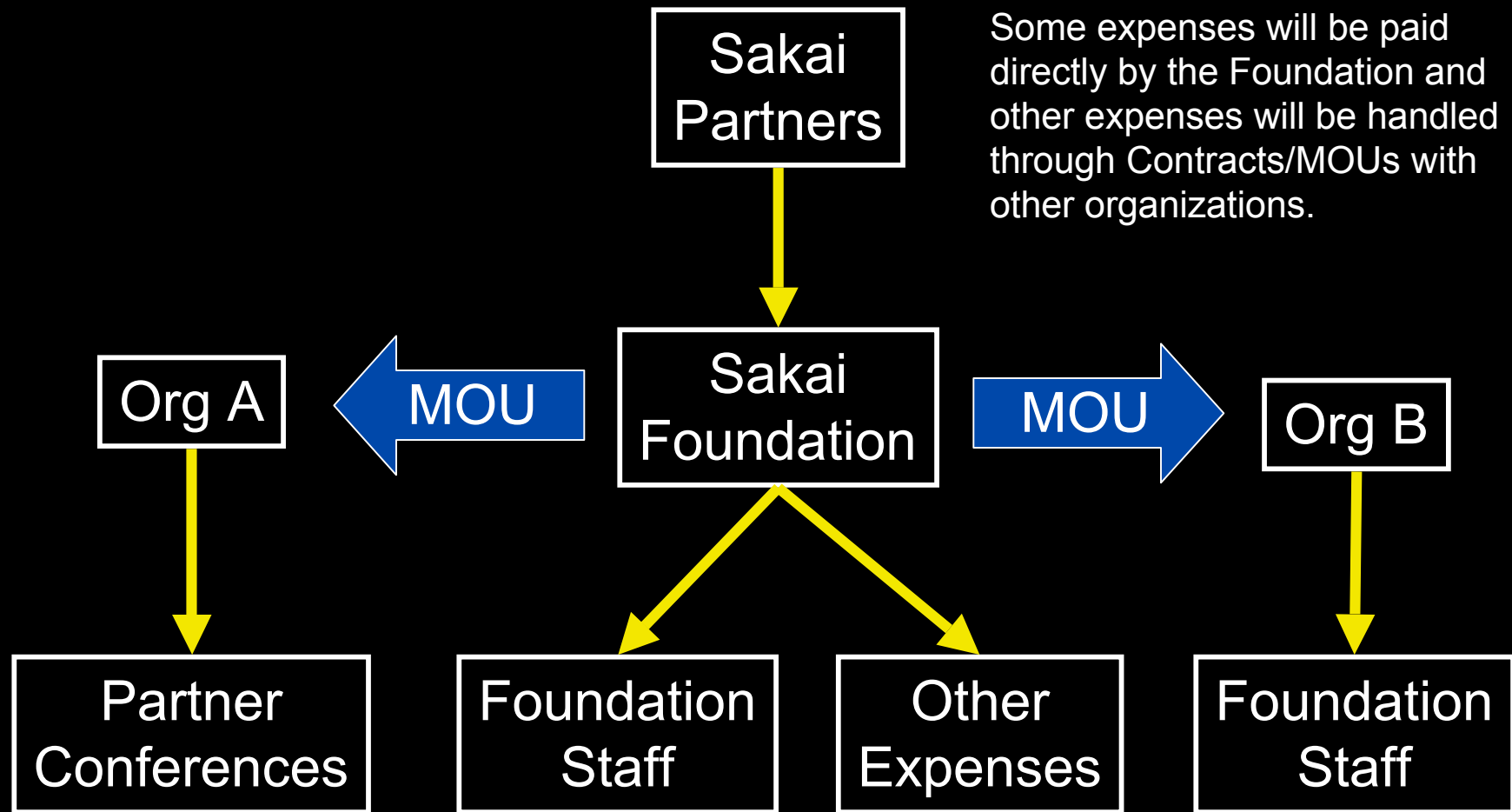
Late Transition (3Q07 - 2Q08)



Transition Complete (2Q08)



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.



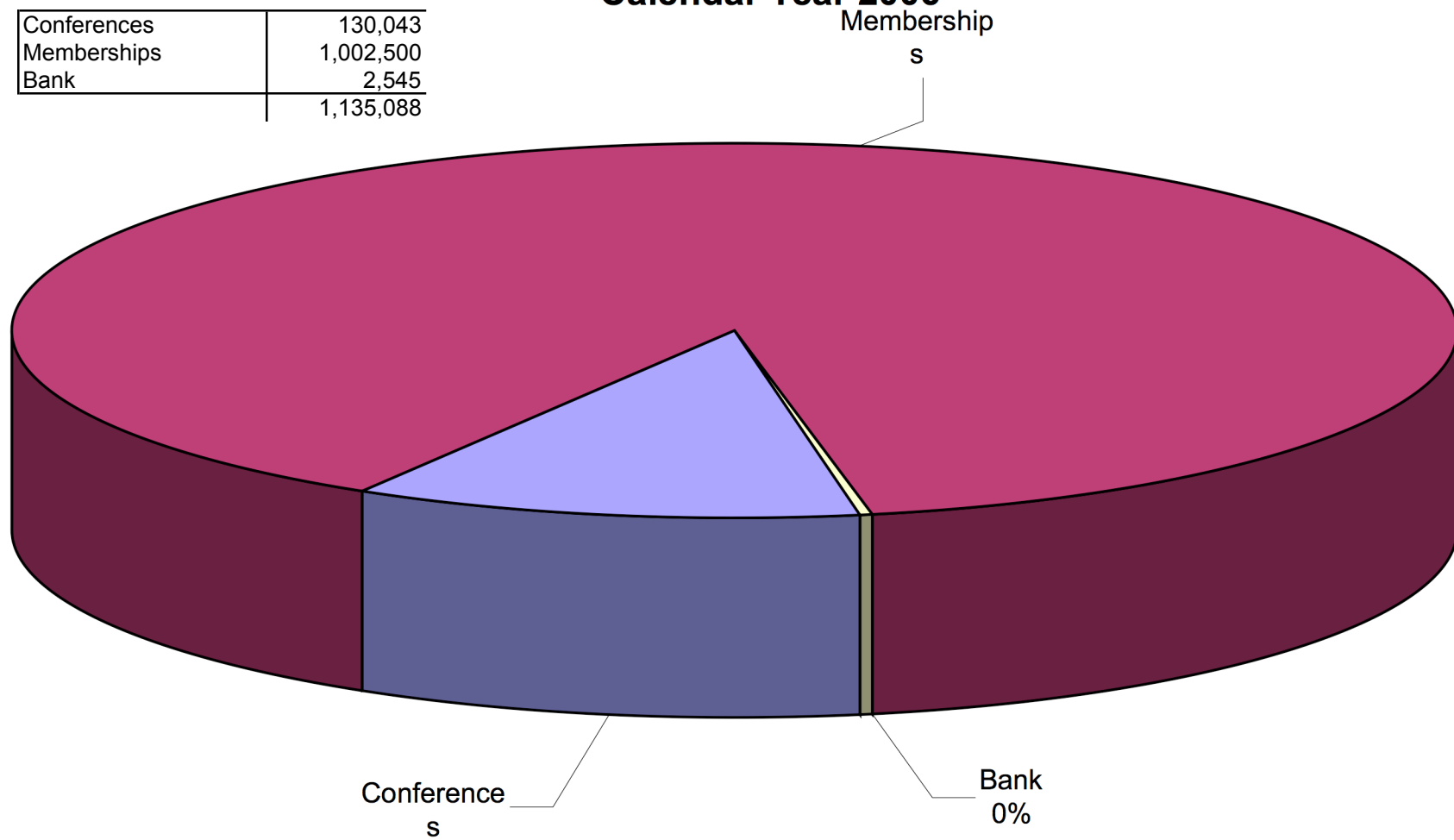
Overall Finances 2006

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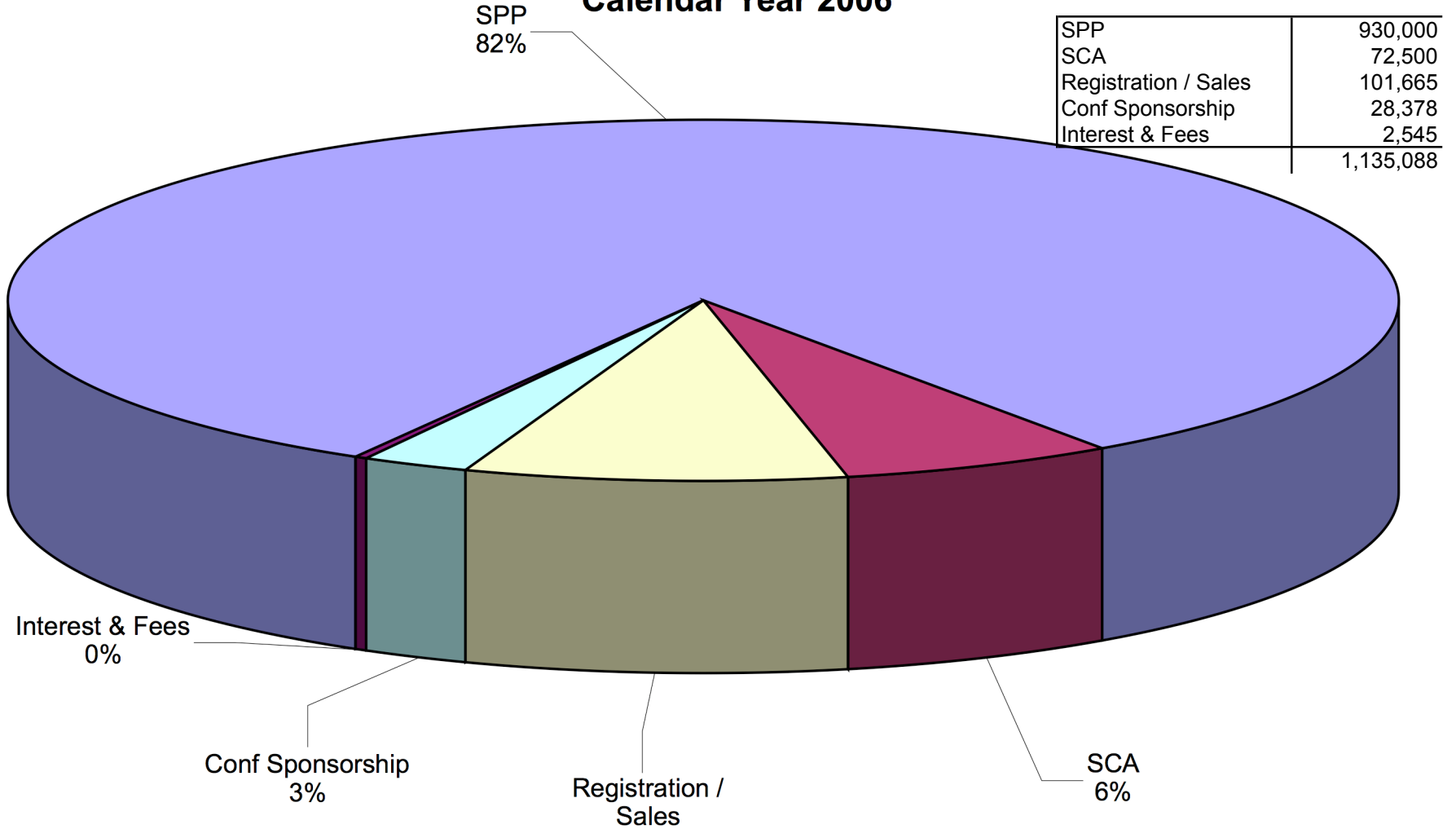


Sakai Combined Revenue Categories Calendar Year 2006

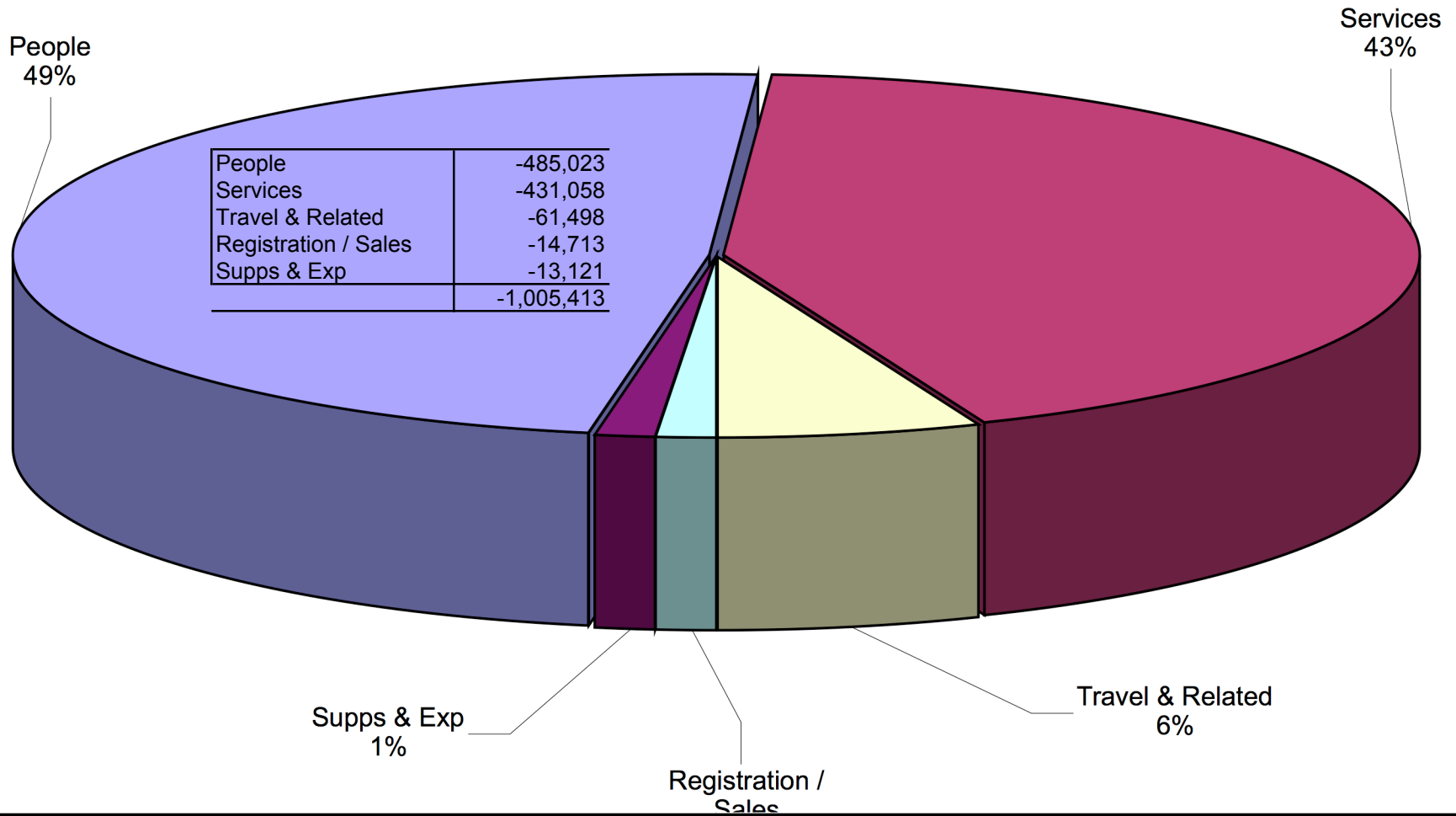
Conferences	130,043
Memberships	1,002,500
Bank	2,545
	1,135,088



Sakai Combined Revenue Sources Calendar Year 2006



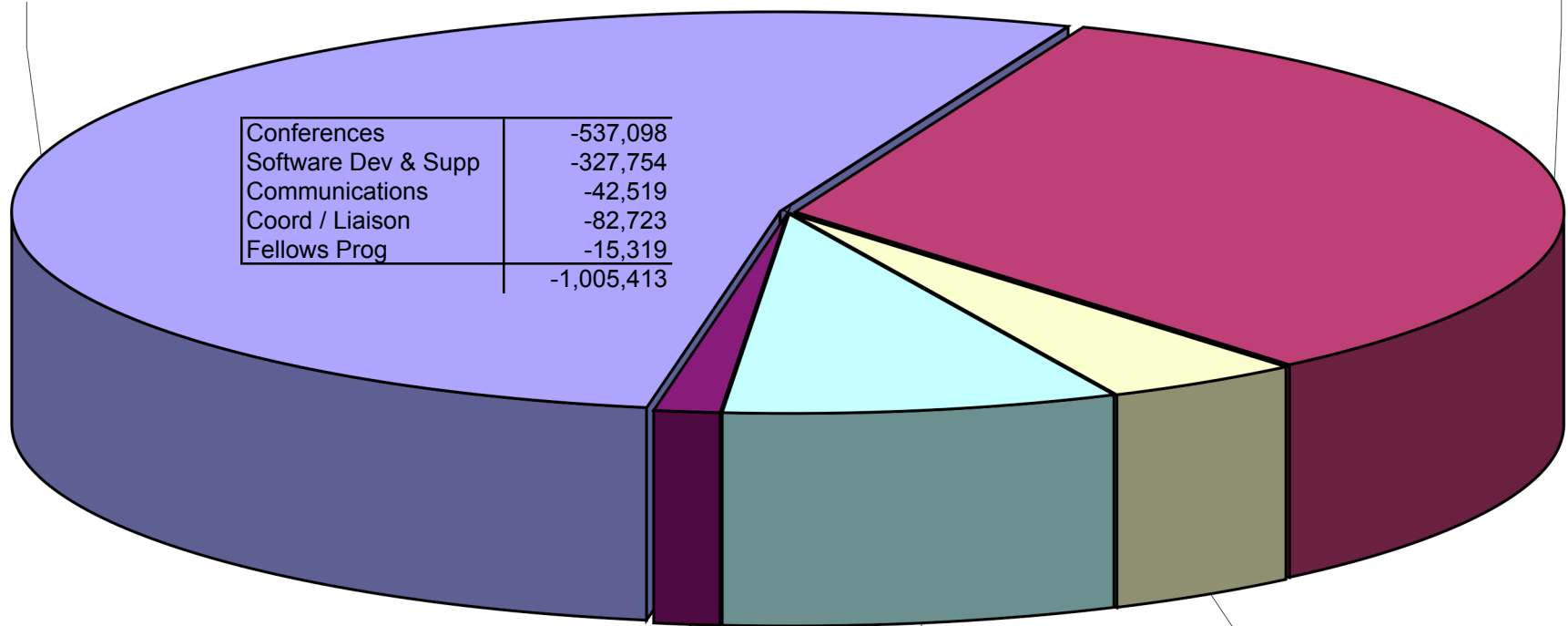
Sakai Combined Expense By Expense Type Calendar Year 2006



Sakai Combined Expense Categories

Conferences
53%

Software Dev &
33%



Fellows Prog
2%

Coord / Liaison
8%

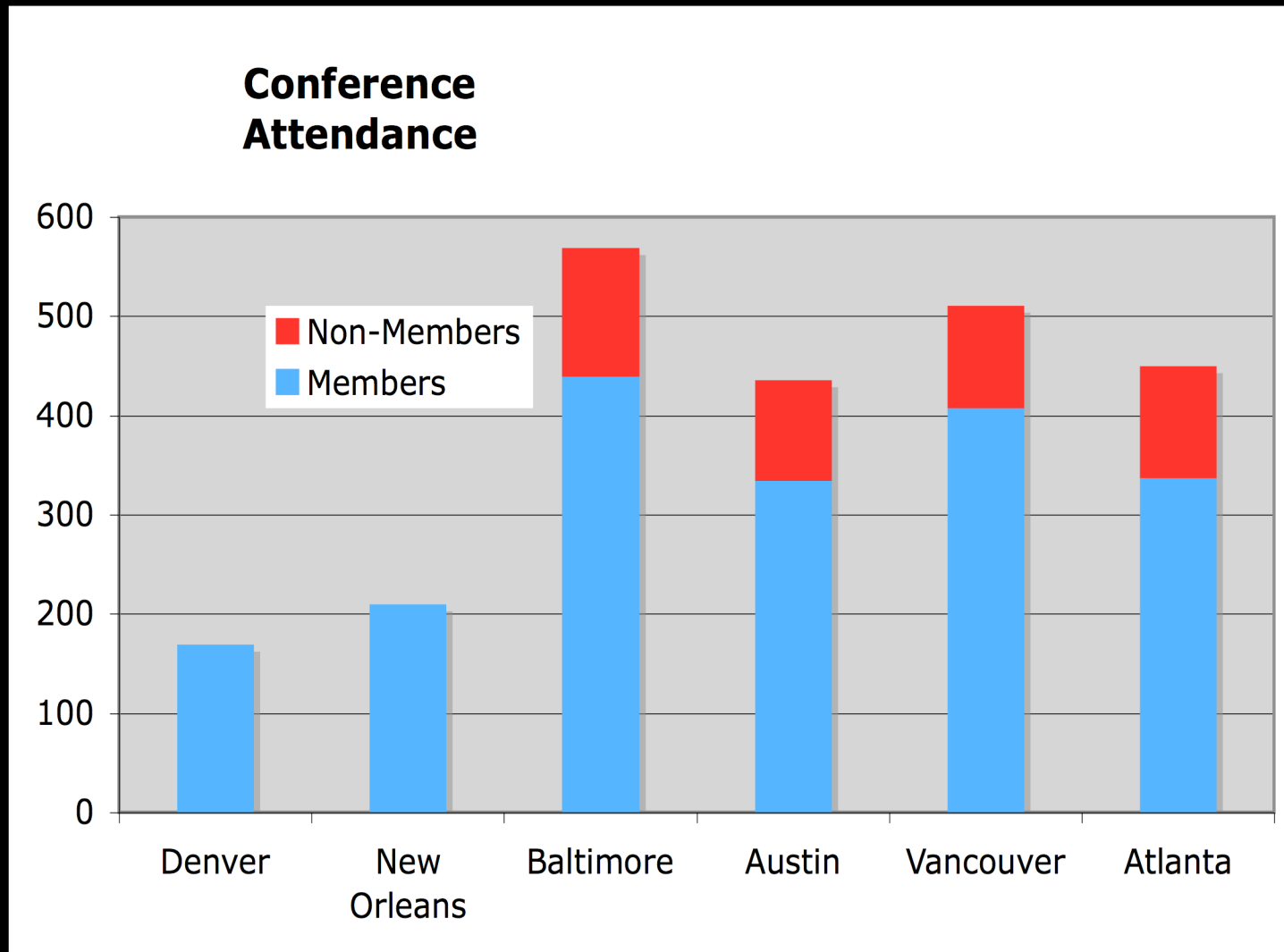
Communications
4%

Conference Finances

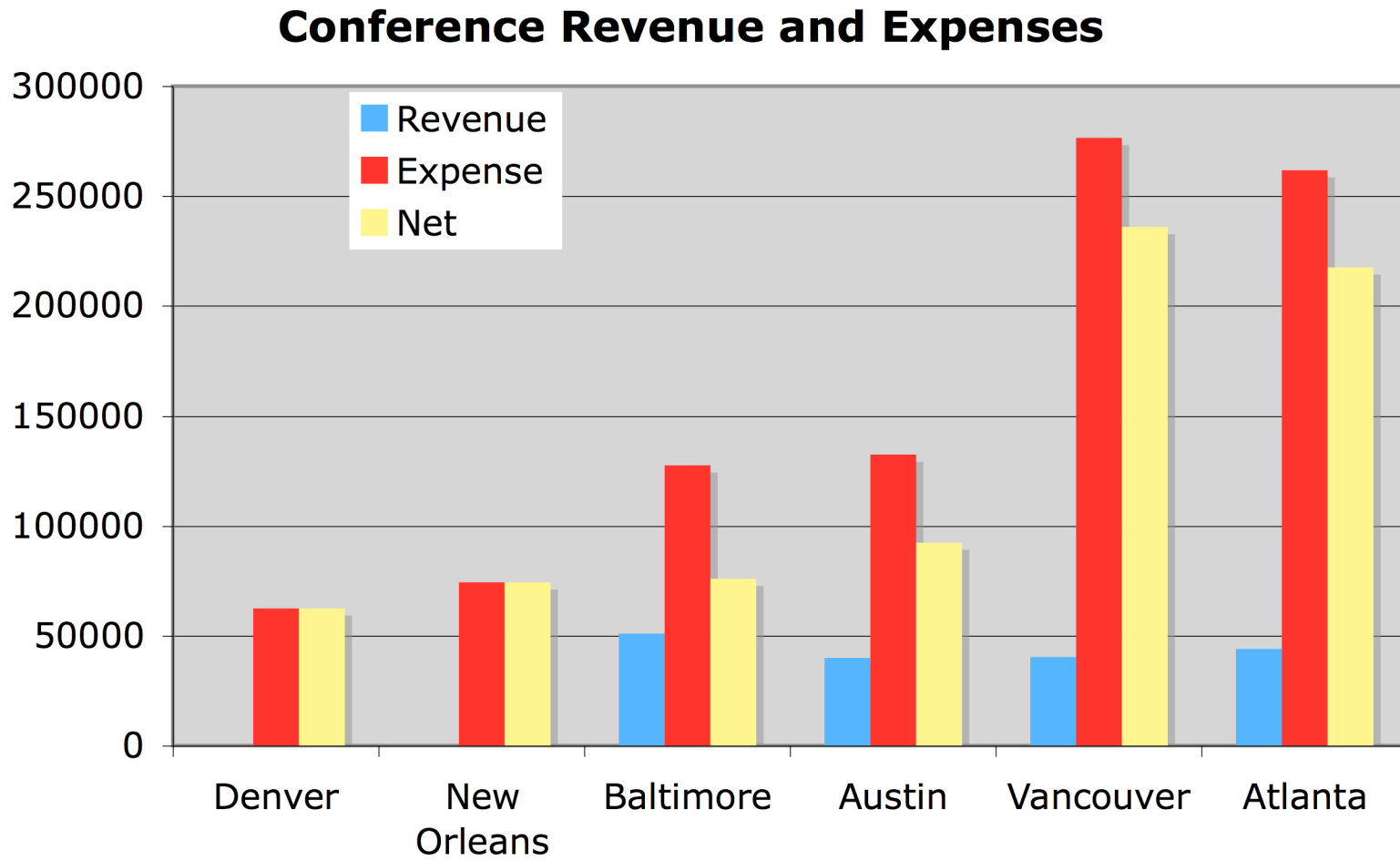
June 2007 - DRAFT



Conference Attendance

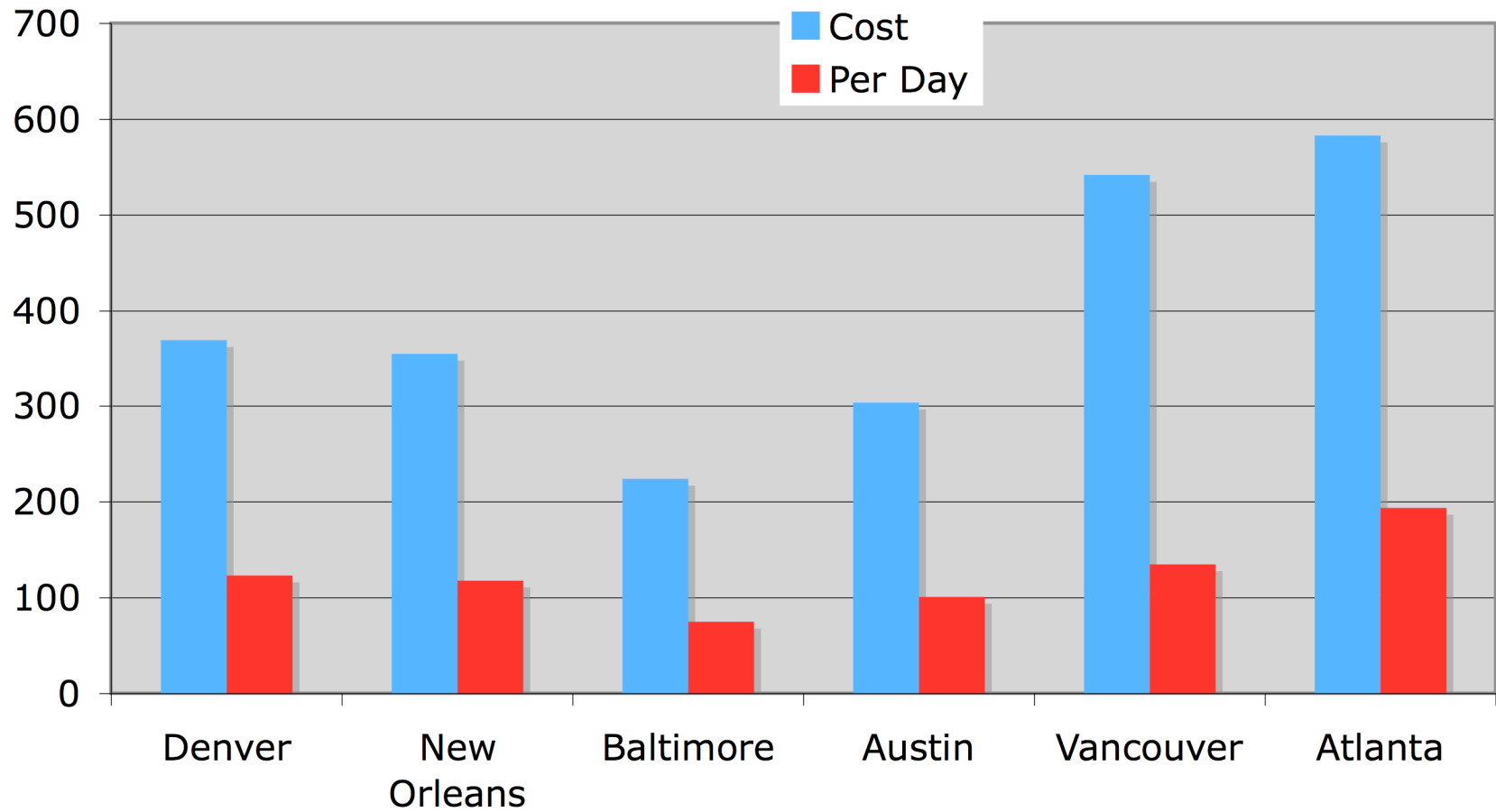


Conference Revenue and Expenses

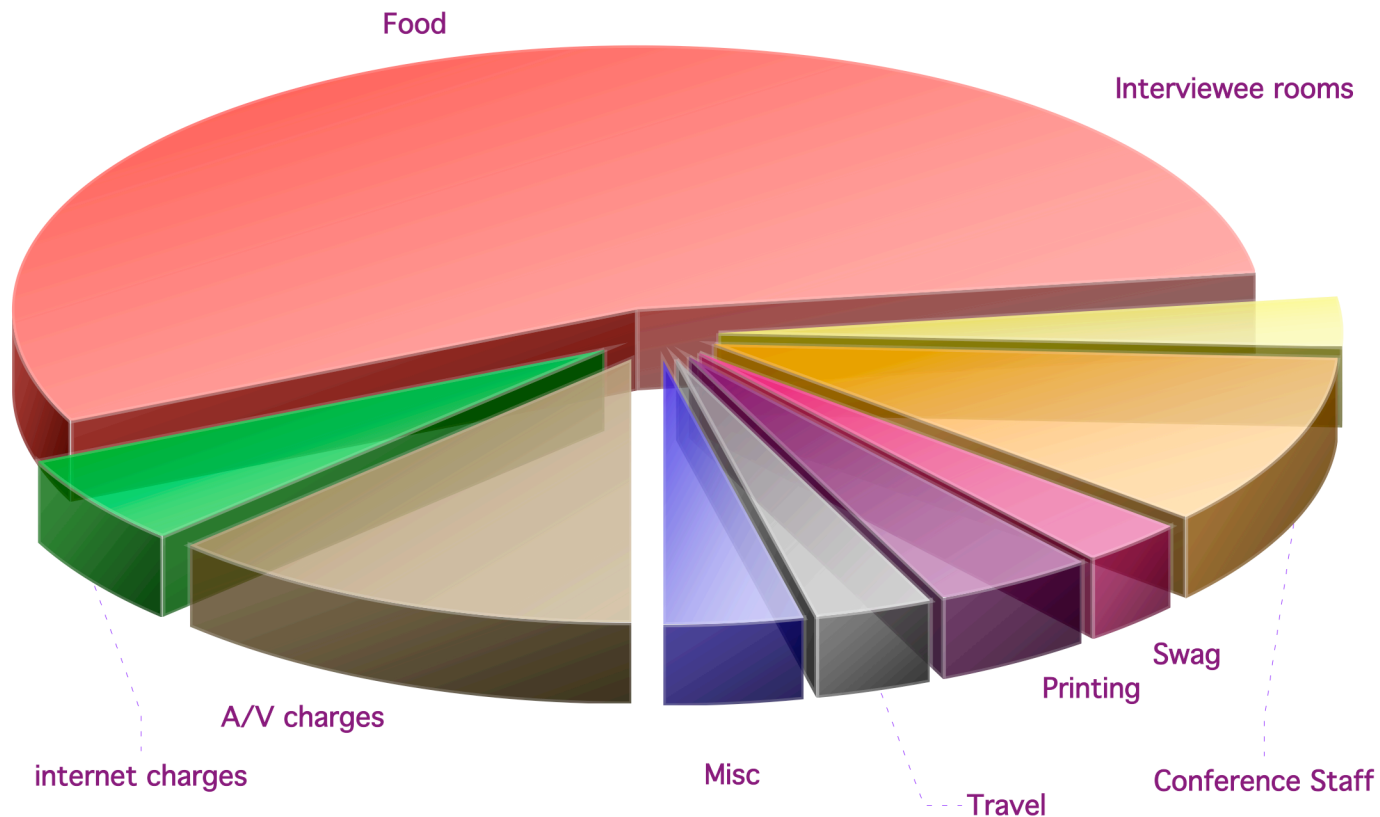


Per Attendee Conference Costs

Per Attendee Costs



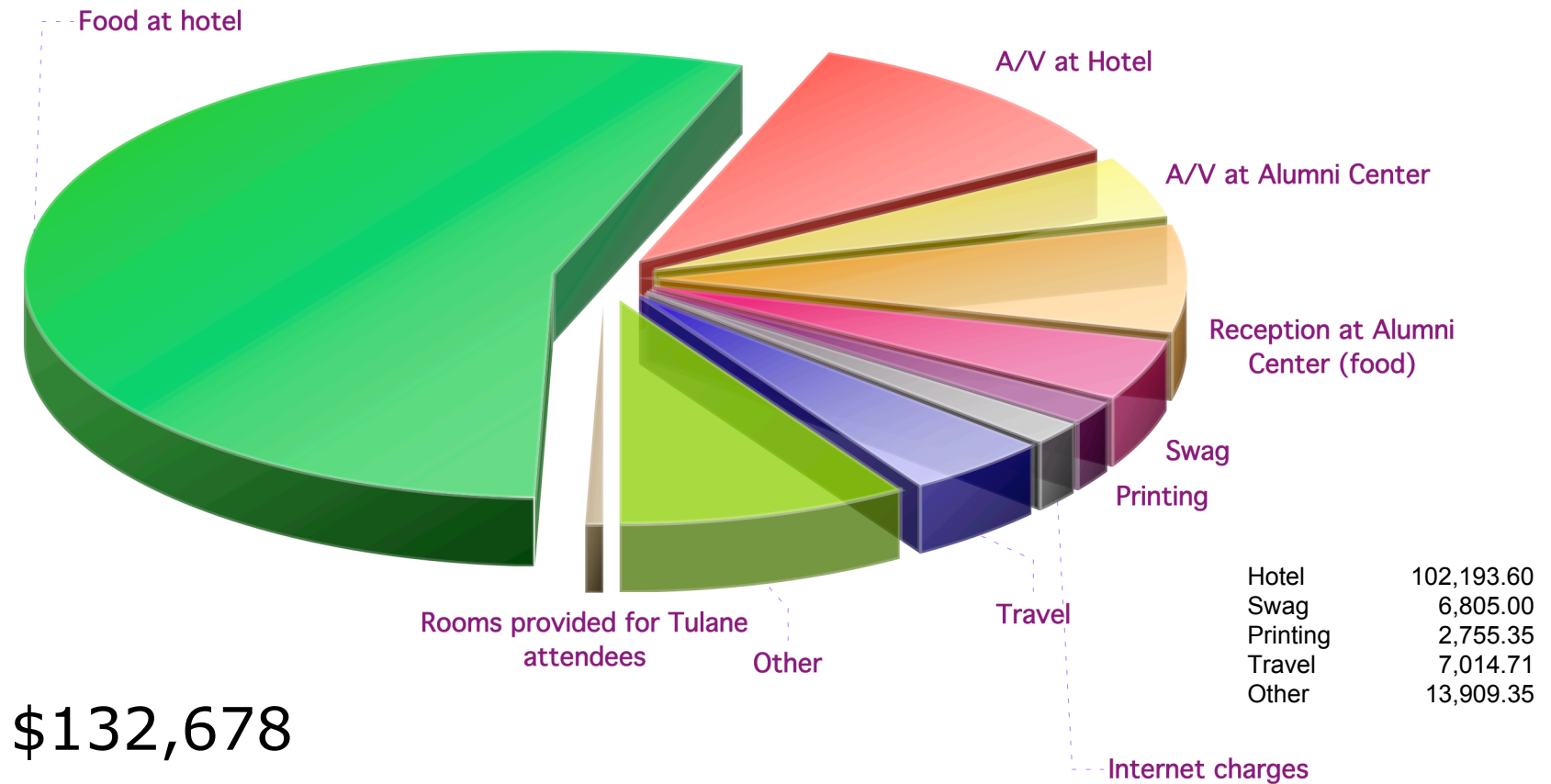
Vancouver Expense Breakdown



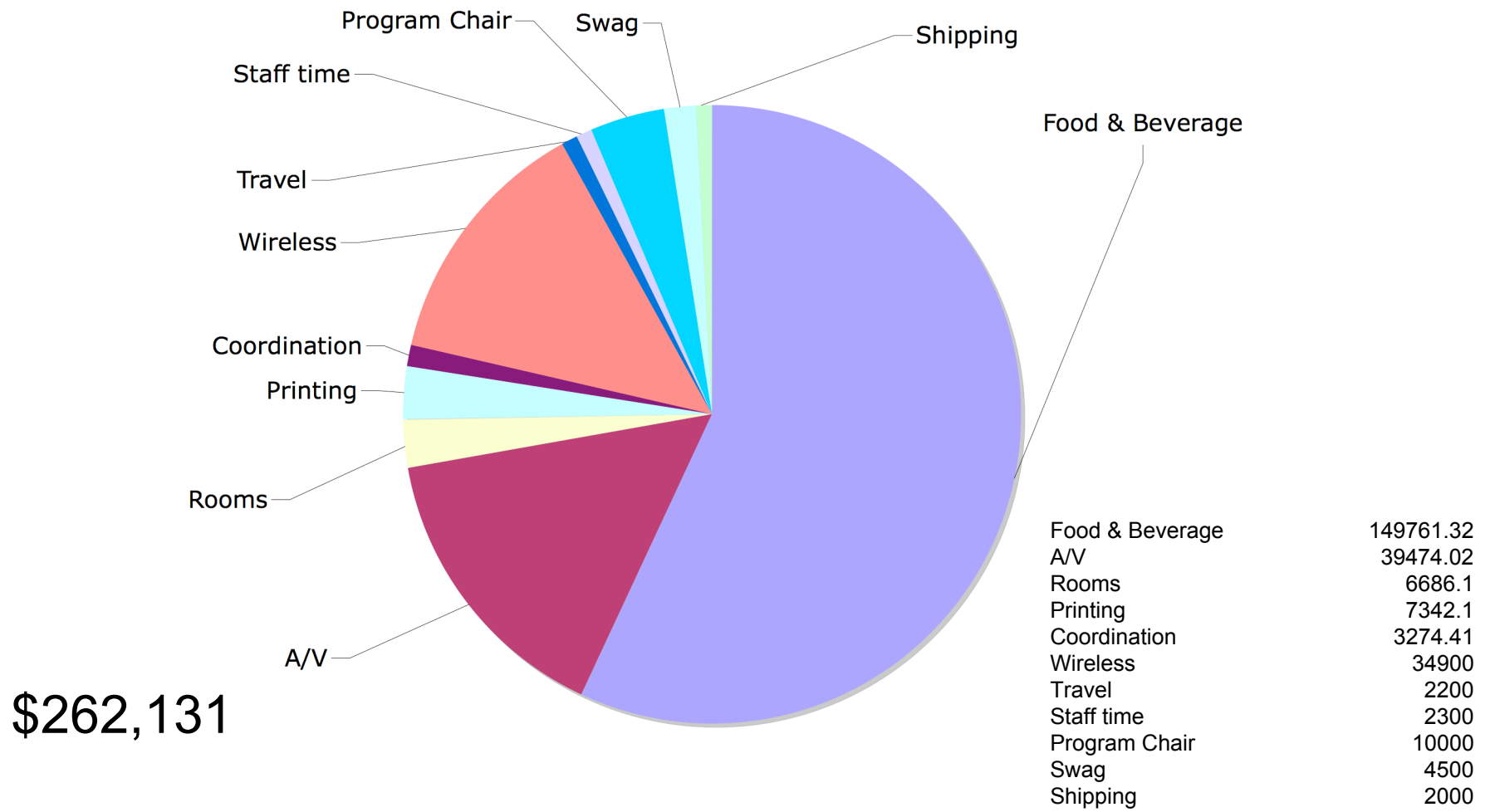
\$276,637

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



Atlanta Expense Breakdown



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

