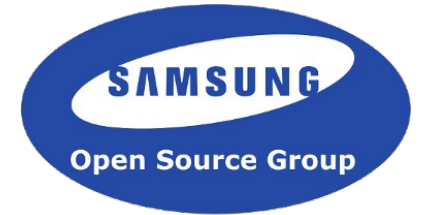




# More Bang for your Buck: How to Work with an Open Source Foundation

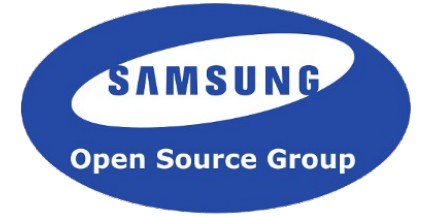
Brian Warner  
Senior Open Source Strategist  
Samsung Open Source Group  
[brian.warner@samsung.com](mailto:brian.warner@samsung.com)

# Introduction



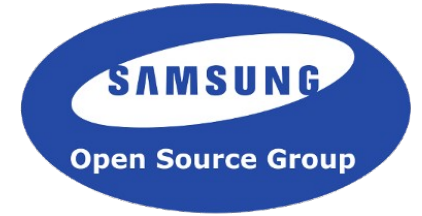
- 5 years with IBM, 5 years with The Linux Foundation, and now Samsung as Senior Open Source Strategist.
- I have built my career on Open Source (and love it).
- My experience ranges from embedded to enterprise.
- I have a degree in Statistics, a minor in Physics, and an MBA.
  
- You can ask me anything during or after this talk.
- No seriously, I did this for 5 years.

# Some things before we begin



- Open Source foundation  $\geq$  Open Source project(s).
  - **A foundation** is built with people.
  - **A project** is build with code.
- We're going to talk about foundations, not projects.

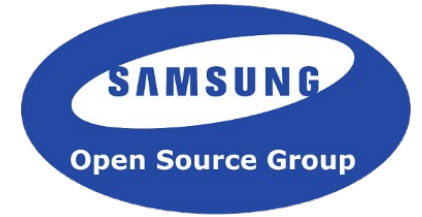
# First, some history



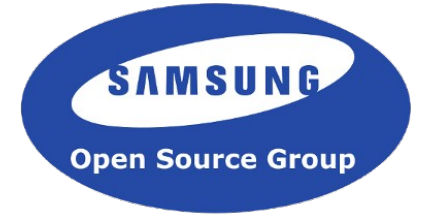
The idea has been around for a while:

**Some software is too important  
to be tied to a single host.**

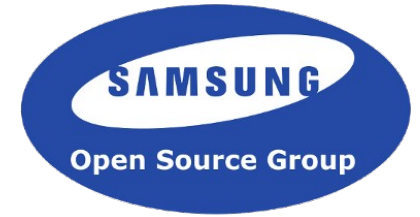
First, some history



# Obviously a lot has changed



- The FSF is still working on code, although they are doing a much greater amount of advocacy and legal activity now.
- A large number of organizations have evolved in the same general mold.
  - 501(c)3 or 501(c)6 non-profits.
  - Supported by membership dues and/or donations.
  - Neutral host of one or more key software projects.



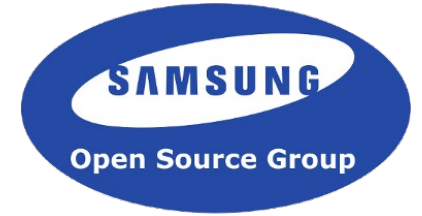
## The Linux Kernel Archives



The Apache Software Foundation



# When is an Open Source foundation needed?



- To preserve an important piece of software that must remain neutral.
  - Core, critical infrastructure.
  - Setting a de-facto, neutral standard.
- When you are launching a new multi-party collaboration.
  - P2P legal arrangements are not as scalable.
  - The industry values neutrality.

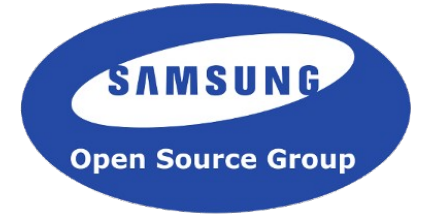


# The point of this talk



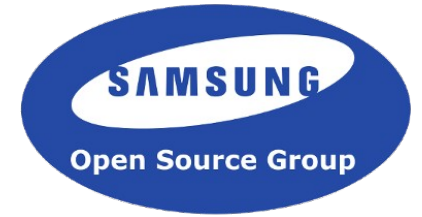
- **What is the role of an Open Source foundation?**
- How do you work effectively with one?
- What should you expect in return?

# The role of Open Source foundations



To be a neutral facilitator that brings experience and credibility to its projects and initiatives.

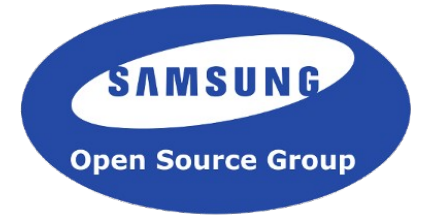
# Why does neutrality matter?



## The biggest reason: Trust.

- You have to **trust** that the decision makers are unbiased.
- You have to **trust** that the project will stick around.
- You have to **trust** that it is worth investing R&D budget.
- You have to **trust** the intentions of other participants.

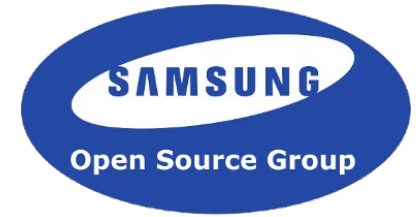
# Why does neutrality matter?



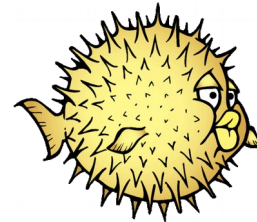
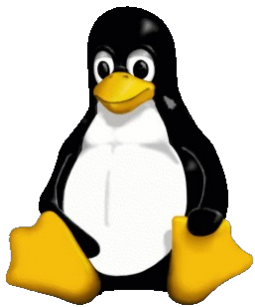
## Trust is an immensely valuable asset.

- It is required for participants to make durable strategic commitments.
- It enables participants to form development alliances.
- It encourages participants to contribute valuable features that make the project better than the competition.
- Trust in the host allows a project to thrive.

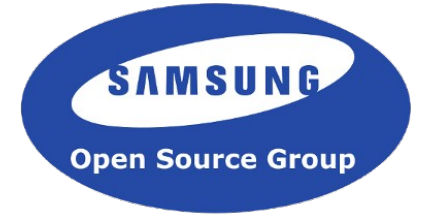
# Neutrality matters



Without the trust of their contributors,  
where would these critical projects be?

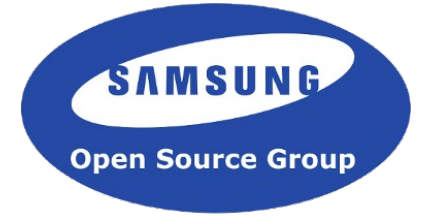


# The role of Open Source foundations

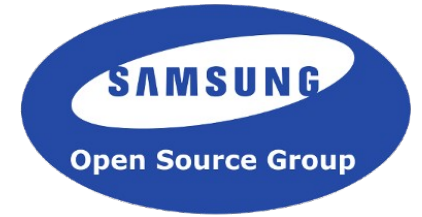


To be a neutral facilitator that brings experience and credibility to its projects and initiatives.

# What does it mean to be a facilitator?



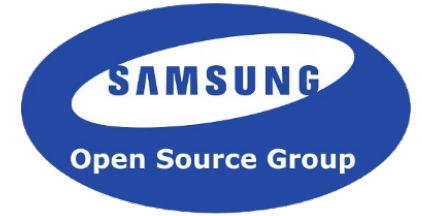
- Successful Open Source foundations are facilitators, helping their projects thrive.
- They do this by providing:
  - Non-profit status (either an organization or umbrella).
  - Services tailored to the project such as IT, marketing, etc.
  - Knowledge and expertise, usually through their staff.



# A SLIGHT DIGRESSION



# How does the Linux Foundation do it?



## All activities overseen by a Board of Directors

Supporting the main Linux mission

Supporting the Collaborative Projects

Technical

LF events

Program management

IT services

Legal

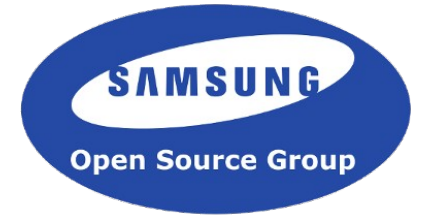
Training

Legal

Creative services

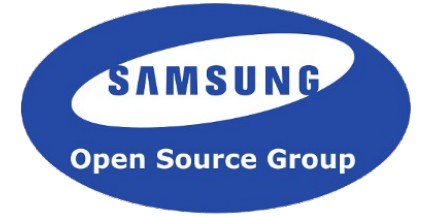
Event services

# The role of Open Source foundations



To be a neutral facilitator that brings experience and credibility to its projects and initiatives.

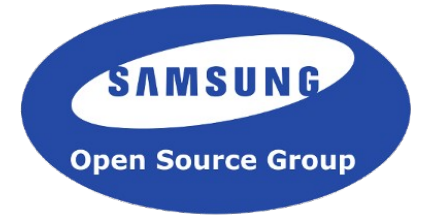
# Experience and credibility



A well-launched project will benefit from startup momentum for a long time.

- However, this requires:
  - Help from people who have done it successfully before.
  - The knowledge of what works and what doesn't.
  - Existing credibility with founding members.

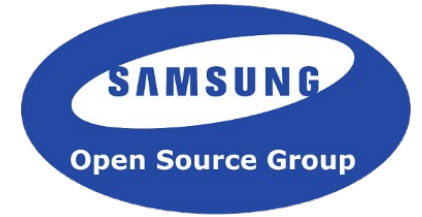
# What experience should you look for?



Knowing the difference between what sounds like a good idea, and what has actually worked with similar communities.

- Contributor License Agreements (CLAs).
- Veto powers.
- Decision-making processes.
- IP policies.
- Licensing decisions.

# On credibility

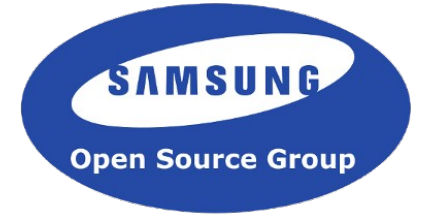


## How you can judge credibility:

- Understands and prioritizes the needs of participants.
- Maintains long term relationships built on mutual trust.
- “Blood, toil, tears, and sweat.”
- A track record of getting projects right\*.

\*Even if some of them don't evolve as originally planned

# The role of Open Source foundations



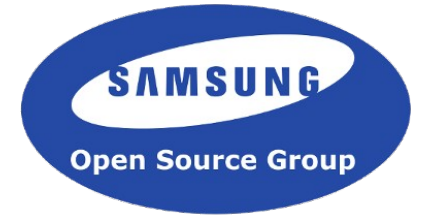
To be a neutral facilitator that brings experience and credibility to its projects and initiatives.

# The point of this talk



- What is the role of an Open Source foundation?
- **How do you work effectively with one?**
- What should you expect in return?

# How do you work effectively?



Every Open Source Foundation is different, but there are a few common things that apply:

- Understand who is on the other side of the table.
- Know everyone's roles and responsibilities.
- Build long term relationships.
- Get involved.
- Ask for help.

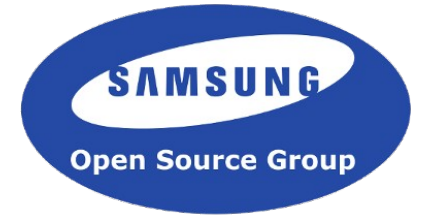


## The other side of the table



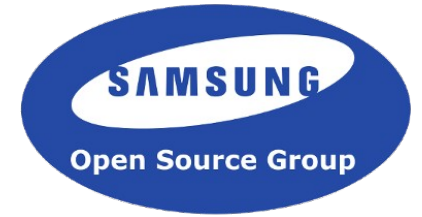
“You keep trying to pick a fight,  
but I’m still just happy you’re alive!”

# The other side of the table



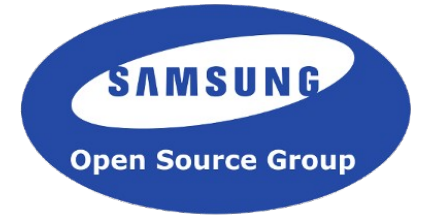
- Nonprofits are businesses, too.
- Understand their ideology and what is important to them before you start a project.
- Consider their ability to satisfy your needs.

# Roles and Responsibilities



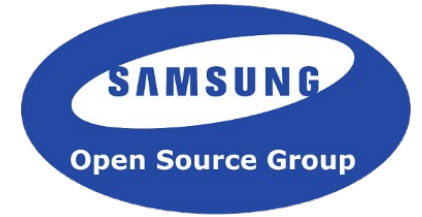
- They will differ from one project to another, and one foundation to another.
- Work within established communication channels and escalate only on an exception basis.
- If escalation becomes the rule, something is wrong with the R&Rs.

# Build long-term relationships



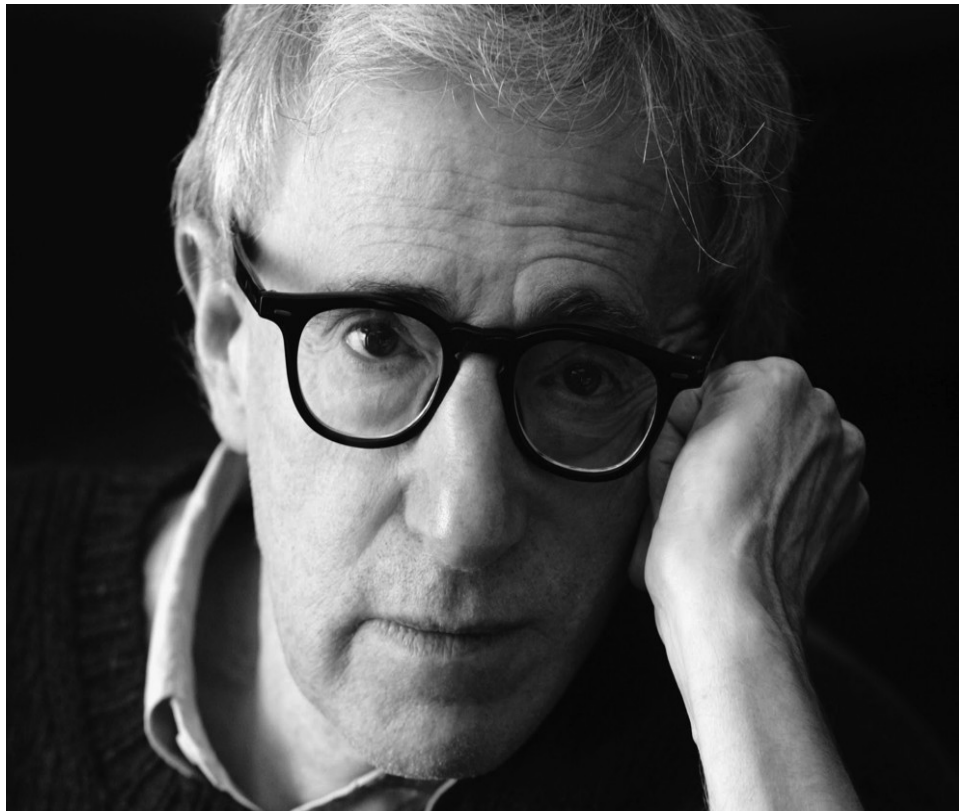
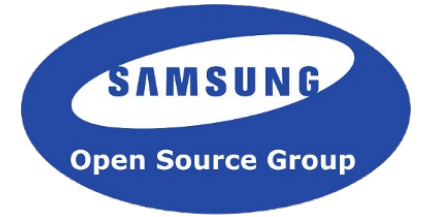
- Technical reputation does not transfer from one open source project to another.
- Personal relationships do transfer, particularly for multiple projects within a single foundation.
- Build these relationships, they're important.

# Build long-term relationships



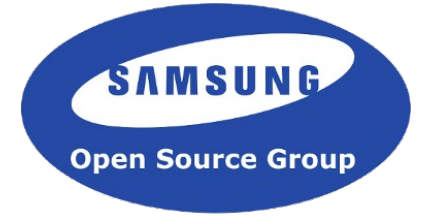
- Quid pro quo – People work harder for those who help them in return.
- This can have a direct benefit to you as the client, as it helps the Foundation better anticipate your needs.
- Remember, they succeed when your project is successful and you are happy.

# Get involved



- Source code isn't the only way to contribute.
  - Make the most of governance and board seats.
  - Participate in the committees.
- These are proven ways to earn influence in a project, and in a foundation.

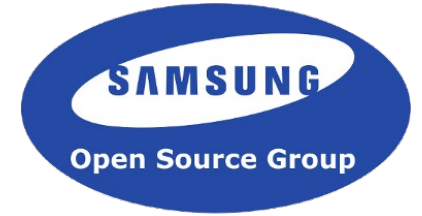
# Ask for help



Never be afraid to ask for help or context. It is in the Foundation's best interest to make you more effective.

- Open Source foundations keep close watch on projects.
- They probably have more context and history.
- They certainly have a different point of view that may be useful, and probably know a lot about others' positions.

# The point of this talk



- What is the role of an Open Source foundation?
- How do you work effectively with one?
- **What should you expect in return?**

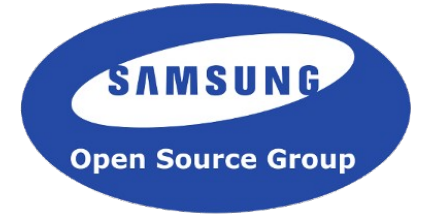


# What should you expect in return?



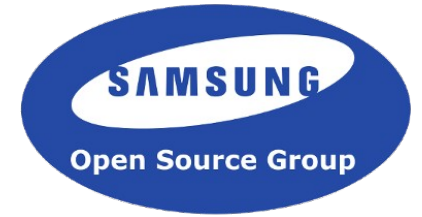
- Neutrality.
- A big-picture view.
- A willingness to transfer knowledge.
- A willingness to build a partnership.

# Neutrality



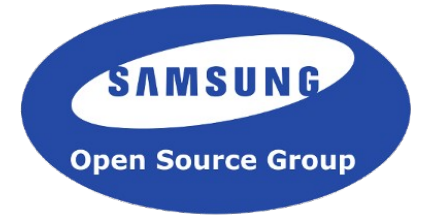
- An Open Source foundation should always take a neutral view, in large projects or small.
- You should look for and expect this from them, as a biased organization loses trust quickly.

# What does neutrality look like?



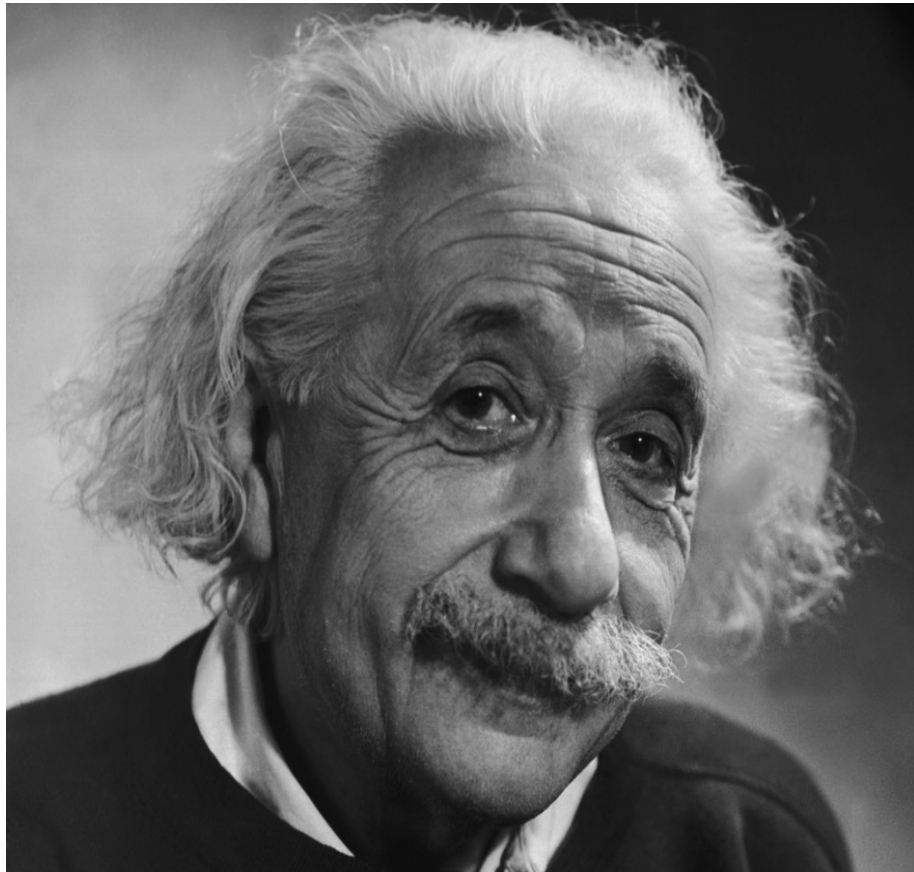
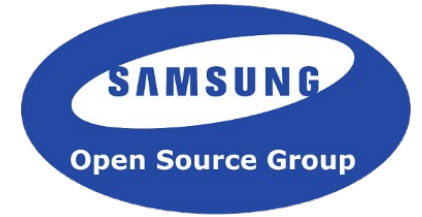
- The Foundation seeks buy-in from members equally.
- No special arrangements written into bylaws except as a membership class (e.g., Platinum vs. gold benefits).
- Decision-making follows the proper process.
- Competitors are welcome to participate.

# A big-picture view



- The Foundation must be able to give guidance and recommendations that lead to a sustainable project.
- This may mean rising above short-term needs in support of a long-term goal (but not always).

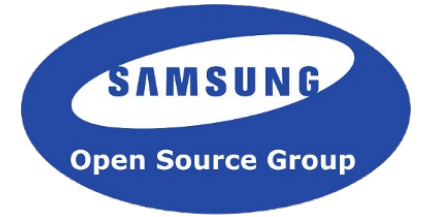
# A willingness to transfer knowledge



## “Information is not knowledge”

- You should expect the open flow of history, insights, and opinion.
- You should also expect discretion.
- There is no value in watching a member repeat known mistakes.

# A willingness to build a partnership

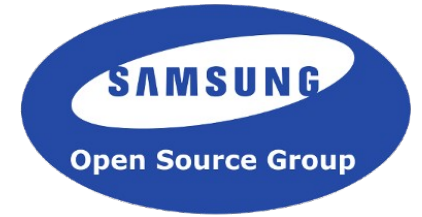


- It's not worth doing business with a mercenary.
- Open Source foundations succeed when their members succeed.
- This is a long-term process.

# Bringing it all together



- Trust is the cornerstone of every interaction.
- Participation is essential.
- Understand roles and responsibilities.
- Bi-directional flow of information is important.
- If you are unsure of anything, ask questions.
- Success is mutual.



Thank you.