

PLUGGING INTO THE CORPORATE BACKPLANE

HACKING SUSTAINABLE SPONSORSHIP
FOR FREE/OPEN SOURCE PROJECTS

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INTRO

Just to lay some ground here, I'll introduce myself.
I'd like to leave some time for discussions, if that's what you want. Do you?

Do any of you have experiences to share?

Please stop me along the way for questions or comments.

AGENDA

Let's talk about how you can create sustainable sponsorship for open source projects in your organization

My perspective is from inside of an organization, working on projects, and recognizing the risk to the organization and projects when support & sponsorship are not given the same level of budget consideration as other essentials.

AGENDA

You may be like me if you are within the org you want to hack sponsorship for.

If you are completely outside of an org, you need to find someone like me inside of the org.

What you will be doing has similarities to being a surveyor -- you will be working in land that only pioneers and trackers have been through, going from waypoint to waypoint, documenting with witnesses at every step of the way.

OVERVIEW OF MODEL (PRE-ALPHA)

WARNING: *This model is pre-alpha, if you break it, it's yours to keep and fix.*

Sustainable sponsorship of open source has many faces, but from an organizational perspective it is about choosing how you spend resources in several ways:

- Humans working on things (OpEx)
- Other operational costs (OpEx)
- Physical things (CapEx)

Let's look at those in a bit of detail.

OVERVIEW OF MODEL (2/6)

Humans working on things are a key resource - for example, writing code and running events.

Sustainability here means job roles are created and filled that have writing code and running events as part of the role.

OVERVIEW OF MODEL (3/6)

Other operational costs - for example, paying for public cloud services to provide automated testing for an open source project or purchasing a sponsorship package for an open source event such as SCALE.

Sustainability here means getting these as fixed items in budgets by creating understanding that it is closer to 'electricity' than 'sparkly water drinks'.

OVERVIEW OF MODEL (4/6)

Physical things - servers in data centers, equipment for running events, etc.

Sustainability here means:

- Get hardware & equipment connected to teams with specified community & contribution roles.
- Get that hardware into the lifecycle process for your org.

Thus servers and video cameras get refreshed every 3 to 5 years, and so forth.

OVERVIEW OF MODEL (5/6)

In all of this be aware that the cyclical nature of your org's budget process allows you to use the justification & requirements steps to review what you really need on a regular basis.

Times will come when you replace technology, such as going from hardware in data centers (CapEx) to hardware in the cloud (OpEx) in support of a project.

If you never reviewed, you might keep on doing the same thing without knowing if it's the currently the best thing for a fast(er) moving project.

OVERVIEW OF MODEL (6/6)

Part of your role in this is being like the gears on a bike, translating from the faster moving open source projects to the speed of your organization.

Once you've built those gear-bridges, you need to make sure they stay in place. This might mean you personally maintain the bridge over the years.

Even better is to turn "maintenance of the bridge" into a job duty or role that is always filled in your organization.

See what I did there? :-)

EXAMPLES & STORIES

Before going into more details on this (pre-alpha) model, here are some examples from my experience:

- ① Provide infrastructure for projects -- Community infra with Red Hat IT & Eng Ops
- ② Go all-in one a new project -- CentOS Project
- ③ Get things into job roles -- Upstream package maintainer (Fedora EPEL)
- ④ Create new community focused roles -- Red Hat Community Architect

MODEL - STEP 1

TIP: *Stop me at any time to ask me to tie one of these steps back to a story or example.*

Start with one aspect of supporting projects that you can put your hands around

What is the problem?

How does supporting one or more projects help?

MODEL - STEP 2

Find people who care and/or are doing something about supporting the projects. Examples:

- Developers working on code
- Generalists promoting events or releases, meetups, etc.
- Someone writing how-to blog posts
- A QE team maintaining a build service that could be in the community
- A technologist running services and ops for the community on a few rented VMs

MODEL - STEP 2 (CONT'D)

These people are already spending time and money to support projects, but it may a disconnected experience and feel to them like a drop in the bucket.

But a few such drops might make a larger difference.

All of these activities are at risk of disappearing in a reorg, because a key person leaves the team or company, etc.

MODEL - STEP 2 (CONT'D)

This group is your initial **stakeholders**. This means they have a stake in the success or failure of your efforts.

Stakeholders are going to help you get some things done, they are going to help you find other stakeholders, they are going to be the champion within their group, and they are going to help find linchpin situations to get budget & job roles added for long-term.

You are going to need to consult stakeholders, keep them informed, and (help) keep them organized as you proceed.

MODEL - STEP 3

Pull together what is being done already by your stakeholders to create sustainability; find the top two or three blockers that might be resolved with a more solid relationship with the upstream community. These should be strategic to your org in some way(s).

You need to add stakeholders from affected domains that would benefit from the more solid relationship.

Enlist the stakeholders' teams to pitch in for whatever is needed. The idiom here is "put some skin in the game."

MODEL - STEP 4

Find some efficiencies in these 'few drops' so you can:

- Show cost savings & benefits to the projects & teams.
- Demonstrate the model.
- Create gravity.
- Generate more internal stories that people can see themselves in.

Starting small and focused also helps with iterative success.

The idiom here is, "Don't boil the ocean to make a cup of tea."

MODEL - STEP 5

Find a rhythm for internal communication and marketing efforts.

Tell people about what you are doing, what you've done, what is coming next, what is the vision, and how they can be involved.

As you have capacity, invite & accept more stakeholders.

MODEL - STEP 6

Once you have stakeholders with resources they can commit (people, money), get them to document how this is done for their group.

Take the time to understand how your organization does budgeting. and figure out how to use that process to ensure sustainability.

MODEL - STEP 6 (CONT'D)

The key is to get the budget allocation & job roles to be included in planning for the long term. A future direction change may reallocate the resources, and that process should be informed by the original research and decision to allocate.

The anti-pattern here is that you convince people to make a change now but it is forgotten about the next cycle or otherwise treated as a one-off. "We sponsored that event, we've done our part for life" v. "It's that time of the year to sponsor our top-tier events."

MODEL - STEP 7 & BEYOND

Keep doing the same model, growing the scope over time.

The idiom here is, "Rinse & repeat."

That's it ... for this pre-alpha model.

Q&A AND CONTACTS

Questions and comments?

These slides, notes, etc.:

quaid.fedorapeople.org/presentations/SCALE_16x_2018

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