
DIAL Open Source Center Documentation

Release 0

Digital Impact Alliance

Feb 22, 2019

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CHAPTER 1

Who We Are

The mission of the DIAL Open Source Center (OSC) is to convene a vibrant, inclusive, free & open source software community that promotes knowledge sharing, collaboration, and co-investment in technology & human capacity to support positive social change in communities around the world. Together, our community will learn and demonstrate how to overcome key barriers in conceptualizing, designing, and building these software products, collectively building a public commons that can be scaled up to achieve global value.

We aim to achieve this mission in the following 4 ways:

1.1 Building Membership

Our members strive to become increasingly mature software projects focusing on impact; agree to a common set of values, mission, and vision; and follow guiding philosophies based on the Principles for Digital Development & other engineering and open source best practices. *Read more about these principles* and how to become a member!

1.2 Service Delivery

Members are able to apply for services provisioned by and for the OSC Community along with its service delivery partners. *Read more about these shared services and how to apply.*

1.3 Direct Funding

The OSC Community will periodically make catalytic grants available directly to its members for product development in areas that are traditionally difficult to raise funding for within the confines of a particular project's scope. *Read more about how to apply* for a grant.

1.4 Community Building

We advocate for projects, funders, NGOs and donors to adopt the PDDs and avoid funding fragmentation and duplication of efforts, specifically by driving the formation of a governance structure for the T4D community as a whole. *Read more about our governance structure and our leadership team.*

CHAPTER 2

Program Governance

More detailed policy descriptions about the DIAL Open Source Center can be found here:

- *Community-Wide Code of Conduct*
- *Contribution Policy*
- *Copyright & DMCA Policy*
- *OSC Governance Policy*
- *Privacy Policy*
- *Community & Project Trademark Policy*
- *Decision Making Process: Recommendations*

About this documentation

The DIAL Open Source Center (OSC) serves to provide support to open source platforms that identified as public goods in the development sector. This site is a library of the program’s working documents.

Additional documents will be published here as they are developed, and all documents are subject to change and evolve over time as we receive feedback from our partners and participants. This documentation site is updated in real-time from our [GitLab document repository](#), and pull requests to improve these documents are always welcome. See that code repository’s [contributing](#) file for details.

3.1 Why Join the OSC?

The DIAL Open Source Center (OSC) is a collective group of individuals who believe in the common challenge, vision, values and goals, and who have expressed an interested in offering their time and talents to achieve those goals. They may be individuals who have independently discovered our group, or they may be associated with organizations doing work related to our mission. Regardless, the community welcomes each and every one of them and their potential contributions.

Join us! Start the conversation with an email to osc@digitalimpactalliance.org.

3.1.1 The Challenge

Over the past decade, the international development community has been exploring how the use of digital technologies – including tools like the mobile phone, the Internet, and open source software – can extend the reach of development. Simultaneously these same development organizations have struggled to leverage open source software in an effort to make their own work more participatory, sustainable, and effective. Mainstream software often used in wealthier markets does not always fully meet the specialized needs of international development projects and the areas in which those projects are undertaken. Other fields have demonstrated the open source software development model as a proven viable model to leverage global collaboration to share costs across institutions, increase the quality of products, and more rapidly innovate. In the development community, the results have been mixed. Relatively few of these open source projects have endured & matured – when successful, enabling improved and sustained access to information and services that previously were out of reach for marginalized populations. Many more efforts have failed, often due to preventable reasons, resulting in countless development investments unable to scale. These open source

digital development projects usually struggle with lack of long-term investments in key focal areas such as community effectiveness & product development. Without emphasis of these key considerations, they can rarely match the functionality and quality of their competitors. As a result, these open source projects can't grow to the more advanced levels of maturity needed for widespread adoption throughout the development field.

Our mission

The mission of the DIAL Open Source Center is to convene a vibrant, inclusive, free & open source software community that promotes knowledge sharing, collaboration, and co-investment in technology & human capacity to support positive social change in communities around the world. Together, our community will learn and demonstrate how to overcome key barriers in conceptualizing, designing, and building these software products, collectively building a public commons that can be scaled up to achieve global value.

Our values

- We believe **technology has a key role to play in both ensuring that international development effectively uses resources**, as well as ensuring that those development programs empower beneficiaries to be active participants in society.
- We believe the **techniques evolved by the free & open source software movement are the best ways** to create inclusive, collaboratively-designed software – ensuring all stakeholders have a voice.
- We believe that **bringing related software development teams into a common virtual space is the best way** to learn from each other, innovate faster, and reduce duplication of efforts.
- We also believe that a **software development community with users actively engaged at its core is the best way** to ensure those users are the beneficiaries of tools that actually make their work and their lives better.

Our vision

We work to achieve a world in which a mature portfolio of open source products and communities collaborate to support international development in highly useful, efficient ways. A reality where barriers are broken down by empowering individuals & local communities to share knowledge and tools. Where support and funding of technology-driven efforts in international development are coordinated within and between sectors.

We dream of a time when innovation is shared, and welcomed as a force of positive change to embrace, rather than a strategic organizational risk ... and an age when educated, empowered, and enabled individuals work to grow the numbers of citizens participating in digital society.

3.1.2 Our Goals for Communities

We believe in the importance of focusing on helping open source digital development projects increase their impact through four key pillars of maturity:

1. **Community effectiveness:** Inclusive & flexible governance models, distributed leadership, integrated community management processes.
2. **Product development:** Integrated product strategy and roadmap, behavior-based measurement of customer success.
3. **Robust technology architecture:** Collaborative & distributed technology leadership, use of appropriate tools for collaboration & software development, integrated formal & user-generated content.
4. **Sustainable organizational base:** Neutral home for vibrant multilateral participation, activist culture focused on stakeholder success, inclusive legal & IP policies that balance autonomy and collaboration.

3.1.3 Guiding Principles

Governance Principles

Many free & open source software projects align with the ideals of “meritocracy”, but the traditional implementation of meritocracy as practiced in other communities often disadvantages certain voices. Rather, the community strives toward a world where technology leads to more equity in the world, and is creating an environment where all voices are heard and encouraged to collaboratively build the best solutions.

As a “holarchy”, the community has a unique process of leadership & decision making. Organized in projects teams, each group is charged to make its own decisions about its software product or initiative; however, decisions are not made “in a vacuum.” Each sub-group will need to consider:

- Pursuing additional co-creators
- Finding ways for newcomers to participate.
- Coordinating with other projects and teams
- Building strategies on things like documentation, outreach, or diversity & inclusion.

Groups may self-organize and work their way through the community membership and service application process to ensure their viability.

Finally, we are a community of individuals. Individuals contribute through writing code, reviewing code, creating bugs, writing documentation, designing graphics, creating and running tests, etc. The community understands that some individuals may be doing this as part of their employment or other arrangement with a third-party organization. Organizations are strongly encouraged to allow individuals to offer their contributions on their own behalf and in their own name. Alternatively, an organization may submit (license) code (or other intellectual property assets) to the community and its sub-projects, however the organization itself can not be a contributor. Organizations will be recognized as sponsors and/or partners of the OSC. The individuals facilitating that partnership will be recognized as contributors.

Licensing Principles

The following discussion is based around legal issues, but is not legal advice and is not written by a lawyer or legal professional.

A significant factor in license strategy will be based on whether or not products from OSC sub-projects will be combined into larger works. If so, license compatibility is a significant issue. Generally, it is very difficult to combine licenses due to incompatible restrictions that they often have about derivative works, distribution, etc.

It is the recommendation of the OSC to utilize strong copyleft licenses, such as the GPL or AGPL for all community projects. The most important factor applied to this decision was that of the social mission of the organization. Because OSC has expressly chartered its community by stating its value that access to technology is key to development of communities and individuals around the world, many funders and/or contributors within the community may feel that their contributions are being “exploited” to some extent by those who would adapt the open source project and improve upon it for profit without also contributing back those changes to improve the upstream product. (Indeed, this risk may be a tax liability for certain types of non-profit organizations, and in certain jurisdictions.) Further, because of the service-based nature of many OSC projects, the AGPL is specifically recommended as it requires those who would make improvements upon the code (such as an implementing organization funding developers) to offer those changes back at the point where they “distribute” their derivative work by deploying it to a server. (Otherwise, such organizations would not necessarily have to distribute their changed source code if it is confined within their organization.) It is also noteworthy that some licenses, such as the Mozilla Public License (MPL), allow its code to be combined with and further licensed with GPL-licensed code, as long as the larger work is licensed under GPL.

In order to change the license of an open source project, it is typically necessary to get the permission of all copyright holders. Unless the project was operating under a Copyright Assignment Agreement (CAA) or some types of

Copyright License Agreement (CLA) for contributors, this means you would have to go back to the project's past contributors and get them to agree to the re-licensing. This effort is likely to take significant time and energy, and may prove unsuccessful. For this reason, moving multiple OSC projects into an organization like Apache Software Foundation (ASF) is unlikely to be successful because of an organization-wide requirement to use the Apache Public License (APL). **For mentored small projects with only a few committers, however, it is worth attempting to relicense the code by getting permission from those copyright owners.**

From an ease-of-implementation perspective, the path of least resistance is to host projects in an organization that allows any license approved by both the OSI and the FSF, who maintain the canonical "approved license" lists for the industry. However, the burden in this approach is mostly placed upon people who would like to contribute to multiple sub-projects within the community – they will need to be much more vigilant about checking licenses for each project and ensuring they commit their code with the proper license. Using multiple licenses is liable to create confusion for all but the most experienced contributors; projects should ensure they do not merge code with an improper license.

In summary, for mentored projects, OSC should begin by officially embracing the copyleft GPL & AGPL licenses, officially encourage their use as a default, and then accept other free & open source licenses on a case by case basis. During a project's mentorship process, it should be evaluated on the practicality of switching to these licenses, either on a short term or longer term timeline. Should that not be possible or reasonable, other licenses can be considered, with preference first toward weak copyleft licenses, and then other permissive licenses.

Finance Principles

Historically, many OSC projects have grown based on responses to needs expressed by organizations and entities funding international development initiatives. These funders may have spearheaded or co-facilitated the development of an entire software project, or they may have sponsored the development of new or improved features in software. Often, this funding has been based on time-limited and scope-limited grants.

We encourage sub-projects to seek potential funding opportunities for development and advancement of their specific software products. Through its partner Software Freedom Conservancy, OSC offers a non-profit fiscal home for management of those funds, which can apply such resources as funding or reimbursement for individual contributors and volunteers who perform specific tasks. **Such decisions will be made by the Project Leader (in consultation with their entire group) along with the OSC Governance Advisory Board.** The Technical Steering Committee exists to assist & coordinate prioritization of feature development or technical efforts of each sub-project.

Unfortunately, a business model in which most resources are dedicated toward growth is rarely a sustainable one. A mature FOSS project – especially one of a larger size – requires effort in traditional "engineering management" tasks such as product & project management, maintenance of a feature development backlog, performance engineering, release management, support, and maintenance of bugs as they are discovered. While FOSS development can often be done by volunteers, history has shown that these efforts alone are not enough to maintain these critical needs. Therefore, additional consideration should be paid to sustainability and resourcing the project as a whole.

As such, the community will **additionally seek separate core funding** for initiatives such as management, maintenance of projects, events, and infrastructure. **A to-be-determined percentage of all project-specific funding will be earmarked for these types of activities,** to prevent investment of all community resources on new features at the neglect of maintaining the high level of software quality our customers expect.

3.2 How We Work

3.2.1 Governance

The Center will be multi-stakeholder, participatory, and open. Strategy will be guided by a **Governance Advisory Board (GAB)** whose members will include representation from participating partners (initially DIAL & PATH), participating projects, funders, sponsors, and other individuals as selected by the board over time. These staff will

serve and convene the **Technical Steering Committee (TSC)** and **Community Steering Committee (CSC)**, both community-appointed groups implementing initiative-wide technical strategy and operational decisions.

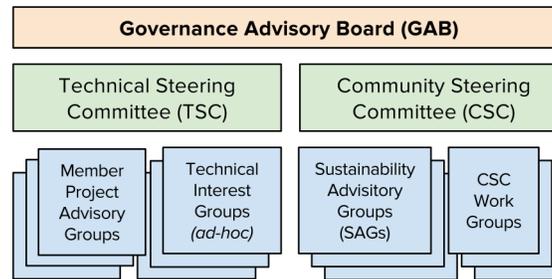


Fig. 1: Governance Structure

Open source projects may participate as more mature **member projects** or by enrolling as a **mentorship project**, in which OSC leaders such as the Director of Technology & Director of Community provide more hands-on guidance and operational support in establishing best practices within that project. Each mentorship project receives a customized set of services based on a gap analysis of needs. Day-to-day decision making for each project remains within each member project's separate **Project Advisory Group**. Additionally, multiple projects may join together to form **Technical Interest Groups (TIG)** focused on cross-project technology questions or implementation challenges, e.g., the use of universal Digital ID's across health and financial sectors. **Sustainability Advisory Groups** will be convened in multiple domains (health, finance, etc.) to connect projects to (and assist in proposing for) programmatic funding opportunities, and will be convened & operated in partnership with experts in that domain. Finally, **CSC Work Groups** will be established to handle challenges in cross-sector & cross-project collaboration challenges, e.g., documentation, diversity & inclusion, etc.

Governance Advisory Board

The OSC Governance Advisory Board (GAB) is a self-elected board serving as the Foundation's management guiding branch of governance. The Board's membership consists of individuals who are committed to steering the Open Source Center to advance its market and technical success, and who serve as positive ambassadors for the project. They manage non-technical aspects like marketing, legal, fundraising, and other management driving topics, together in consultation with the Managing Director. They also define the strategic direction for the Center and set policies and procedures to enable the Center to work toward those strategic goals. The GAB leaves all technical decisions to the open source meritocracy within member projects and the Technical Steering Committee (TSC). The Board is self-organized in respect to size and membership – however, membership is constrained to ensure no more than one-third of voting members have a legal or financial relationship with any single third-party organization. At minimum, membership shall include the chairs of the TSC, CSC, as well as each sustainability advisory group. In order to provide outside perspectives, at least 10% of GAB membership shall be individual(s) having no other affiliation with the OSC.

Community Steering Committee

The Community Steering Committee (CSC) is responsible for ensuring collaboration is the driving principle within the Open Source Center, its projects, as well as between member projects and the broader community. The CSC is also responsible for admitting new projects to the mentorship program as well as graduating projects from the mentorship program. The CSC Chair (Director of Community) sits on the Governance Advisory Board (GAB) and provides a conduit for communication between the management and community governing bodies within the OSC. Membership

is comprised of the Director of Community as well as leaders from each participating project or team that does not have a primary focus of producing software, e.g. documentation, outreach, inclusion, etc.

Technical Steering Committee

The Technical Steering Committee (TSC) is responsible for ensuring member projects are operating effectively to create software that delivers on each project's vision and meets the needs of constituents. The TSC will serve as the Center's primary technical liaison body with external open source projects, consortiums and standards bodies. The TSC does not normally make everyday technical decisions on behalf of sub-projects, however it may assist those projects in decision-making when requested. The Committee may also facilitate coordinative decisions between member projects. It is also responsible for evaluating when and how mentored projects move through project lifecycle phases. The TSC consists of project leaders from each member project in an active state, the Director of Technology (who serves as a chief architect & consultant to sub-projects), and other members which the TSC may appoint from time to time. The TSC Chair also sits on the Governance Advisory Board (GAB) and provides a conduit for communication between the management and technical governing bodies within the Open Source Center.

Sustainability Advisory Groups

These groups exist as a service organization to client projects wishing to receive guidance & advice on sustainable funding opportunities for their projects. Sustainability Advisory Groups will exist in multiple domains/sectors, with Health being the first such established group. Members of each SAG will consist of experts in the domain, open source experts, and T4D experts generally.

OSC partner **PATH** is **planning to fund at least 1 person** to convene the **Health Sustainability Advisory Group** through its Digital Health Initiative (DHI). The chair of this group will assemble a group of peers to curate health-related digital development funding opportunities & assist with review of proposals by participating projects and other initiative participants.

Fiscal Sponsor

Overall financial and legal management of the Open Source Center (OSC), as overseen by the Governance Advisory Board, is entrusted to one or more fiscal sponsors. A fiscal sponsor, as defined here, is a legally-organized nonprofit organization providing key services to the OSC community. They may occasionally provide legal representation, asset stewardship (such as trademarks or copyrights), and may hold money to be used as directed by the community's leadership structures. The **Digital Impact Alliance (DIAL) at United Nations Foundation** is the current fiscal sponsor of the OSC.

3.2.2 Roles

The governing bodies of the Center will be staffed by both paid and unpaid individuals, who each participate independently, but at times may be financially or otherwise supported by an employer or 3rd-party organization to cover their time and efforts. Specifically:

Managing Director

The managing director of the OSC will be responsible for public outreach of the organization's initiatives, working to solicit OSC sponsors & member projects. The person serving in this role is appointed by the OSC's fiscal sponsor with the advice & consent of the Governance Advisory Board (GAB). This role is also responsible for ongoing financial & resource management of the Center in collaboration with the fiscal sponsor. **Jeff Wishnie** currently serves in this role on an interim basis.

Director of Community

The Director of Community is a full-time role in service of member projects and the Community Steering Committee (CSC), and is appointed by the OSC's fiscal sponsor with the advice & consent of the Governance Advisory Board (GAB). The individual in this role serves to manage community resources and communications, as well as to assist with promotion and marketing of the community and various member projects. The Director of Community has a permanent *ex officio* (non-voting) seat on the GAB and is charged to keep that group advised of current issues & concerns within the community. **Michael Downey** currently serves as the OSC Director of Community.

Director of Technology

The Director of Technology is a full-time role in service of member projects and the Technical Steering Committee (TSC), and is appointed by the OSC's fiscal sponsor with the advice & consent of the GAB. The individual in this role serves as a technical consultant and advisor to participating projects to assist with project architectural considerations. The role also serves to marshal infrastructure resources needed by various MSPs and provide them at a community-wide scale. Finally, serving as the chair of the TSC the individual in this role works to coordinate the work of various member projects and assists with project integration efforts. **David McCann** is the current OSC Director of Technology.

Future Roles

Additional **future roles may be served by volunteers** on an as-needed basis. DIAL will encourage partners and other participants to offset expenses of these volunteers.

3.2.3 Long-Term Sustainability

Over time, the Center itself may be sustained long term by a combination of **overhead fees** from both mentored & participating projects, related **business income** such as hosting of participating project software (e.g. SaaS offerings) for their clients, **consulting** fees generated by people serving in key project roles, **sponsorship** by supporting organizations, and **donations** from individuals.

3.3 Shared Services for OSC Members

As part of its collective action to assist its members, the OSC will make available a variety of shared services, as outlined in this document. Services may be provided through OSC leaders funded by DIAL or other organizations, through volunteers within the OSC community, or through service delivery partners. These services may be “light touch” such as advisory or mentorship work, or more “hands on” activities such as technical assistance in several areas.

Beyond this overview, see also our *current list of services* for additional details.

3.3.1 Types of Services

Mentorship & Advising

At a basic level, participating projects can draw upon other members & OSC leaders for generalized advice around best practice, through our online communication channels, or participation in the various OSC governance committees and groups.

Technical Steering Committee (TSC)

The OSC convenes a technical steering committee (TSC) of experts (both leaders of member projects as well as other technical experts), which is available to consult with member project leaders on questions of architecture, technology choices, and technology strategy. Participating member projects may use the TSC as a point of escalation for difficult questions, arbitration during technically-focused project conflicts, or advice for questions outside that project's current area of expertise.

Through its regular meetings & consultation services for members, the TSC may provide recommendations for standard processes, templates, technologies, and workflows to document and track work backlog & prioritization by each member project's teams. It may also provide general 1-on-1 engineering mentoring services from the Director of Technology or other individual experts, at the request of specific member project teams or the TSC.

Should members need more "hands on" technical assistance from the TSC, they may peruse a variety of shared services based on their level of project maturity & needs, as described below.

Community Steering Committee (CSC)

The OSC convenes a community steering committee (CSC) of staff and volunteers (including volunteers from member projects as well as outside resources) to serve customers & contributors of OSC member projects.

Member projects may consult with the CSC for periodic advice about marshaling resources appropriately, best practices in community management, or matching volunteers to available opportunities. The CSC also serves as an available point of escalation in conflict resolution, as well as representing member project concerns to the OSC Governance Advisory Board (GAB).

Should members need more "hands on" technical assistance from the CSC, they may peruse a variety of shared services based on their level of project maturity & needs, as described below.

Sustainability Advisory Groups

Through our partners, we also plan to provide **advisory services for financial sustainability planning** by & for member projects – specifically, through our **sustainability advisory groups (SAG's)** which will work to connect projects to funding resources within or across domains, as well as help them to prepare successful proposals for those funding opportunities. Our first such group will be a Health Sustainability Advisory Group (H-SAG), and will be available in the first quarter of 2018.

As we launch additional sustainability advisory groups for multiple sectors, these groups will also collaborate to explore areas of interoperability, technology re-use, and collaborative funding opportunities across those sectors.

Technical Assistance

Mid-stage projects desiring more "hands on" services to assist with their day-to-day operations and growth often have need for various types of services that they have not been able to obtain through their project's volunteers or partners. Drawing on best practices evolved over the last 20+ years in professional open source development, OSC members will have access to several types of shared services.

Supported projects can receive direct assistance through a variety of professional service offerings, such as legal, IT infrastructure, product management, engineering management, community management, etc. These services will be provided through a combination of OSC staff resources (funded by DIAL or other partners), directly through partner resources, as well as by selected third-party service providers.

Engineering Services (via the TSC)

Through the Technical Steering Committee (TSC), the OSC strives to provide ongoing tactical & strategic assistance for engineering work throughout the community's member projects. In addition to the mentorship & advising services described above, technical assistance services available through the TSC includes:

- A community-wide, full-time funded (via the OSC's fiscal sponsor) Director of Technology available to assist member project leaders in clarifying and documenting a technical architecture for each project,
- Available advanced-tier technical support & consultation for member projects engineering challenges, through the Director of Technology or other roles,
- Monitoring of member project's work backlog to ensure there are ample opportunities for potential volunteers, and
- Hands-on architecting and coding assistance from the Director of Technology or other individuals, at request of specific member project teams.

Community Services (via the CSC)

As the convener of a Community Steering Committee (CSC) serving customers & contributors of OSC member projects, the Center can provide the following services to the community to help maintain itself in a sustainable way:

- Assistance with governance planning to create and refine project processes, policies, and standards,
- Preparation for (and application to) 3rd party fiscal sponsors, such as OSC partner Software Freedom Conservancy,
- Organization of and participation in external outreach & recruitment programs, such as Outreachy, Google Summer of Code, and Google Code-in,
- Assistance of member projects in making of community-wide non-technical decisions,
- Organization of project marketing & outreach programs, and
- Assistance with volunteer management for newcomers interested in contributing to one or more member projects.

Legal Services

Through our partner Software Freedom Conservancy, OSC members may be able to obtain access to some or all of the following:

- Trademark ownership for member projects' assets,
- Copyright assignments of distributed packages of FOSS-licensed software,
- Limited liability protection for contributors & leaders,
- Bank accounts for holding financial assets,
- Appropriate legal response to DMCA and other copyright-related claims, and
- Appropriate tax compliance, operating as a public charity or other similar non-profit organization.

Infrastructure Services

Additionally, as membership demand warrants, the OSC will secure and/or operate various infrastructural services commonly used by well-functioning FOSS projects such as:

- A globally-accessible forge with public and private code repositories,
- Web site hosting (project pages or sites as size may warrant),
- Issue trackers for community-level work and member project work,
- Forums and/or mailing lists as appropriate for overall community strategy,
- Real-time chat service for contributors to projects and for customers,
- Wikis and/or other platforms for written documentation on software as well as participation processes of each member project,
- Continuous integration/delivery pipeline tools for unit & integration testing, as well as deployment purposes,
- Non-production deployment targets for various interactive testing purposes by developers/contributors, automated test systems, user acceptance testing, and public “demonstration” purposes,
- Monitoring tools to ensure a high level of availability of these systems, and
- Coordination of a team of project volunteers to help manage these services & consult in their effective use.

Documentation Services

The OSC plans to forge partnerships with a community of “documentarians” interested in the T4D field, to be available on a shared basis across multiple member projects. These individuals would generally focus on documentation strategy, as well as creating frameworks, tools, and processes to increase the capacity for quality documentation for your project’s users and contributors.

More details about documentation services will be made available later in 2017.

Direct Grantmaking

The Center will offer projects small tactical grants (\$50k to \$100k) to address neglected bottlenecks affecting project effectiveness and momentum. The grants may target any of the challenges facing projects including product issues (design, reliability, packaging, documentation), organizational (governance, legal), infrastructure, strategy, etc. Grants can be applied for on an ad hoc basis as part of a larger service offering proposal, or projects can apply to biannual thematic grants for specific, focused interventions. *Read more details about our grantmaking services.*

Potential Future Services

As the OSC grows, we plan to offer related shared management services assist with organization of members’ business affairs. These services may include:

- Corporate compliance, such as convening meetings of a board of directors for the host organization, as well as filing of necessary reports and paperwork,
- Ongoing accounting of donations and other revenue, disbursement of funds in accordance with direction from the advisory board, and related bookkeeping tasks,
- Preparation and submission of various tax filings, and
- Publication of necessary documentation to ensure transparency of management operations.
- Business development and fundraising for individual member projects (as well as the community as a whole),
- Development and operation of of an appropriate funding/compensation model for individual contributors & volunteers to take on task such as feature development work, business analysis, and other advanced engineering management roles,

- Marketing & advertising of member projects in various channels.

By participating in (or providing feedback to) the OSC Governance Advisory Board, members can influence the availability of new services and growth of the Center.

Service Details

Read our *full list of services* for additional details.

3.3.2 Service Benefits for Stakeholders

Through the delivery of these services, the OSC impacts three key constituencies:

1. **Funders and sponsors** of participating projects or the OSC initiative as a whole.
2. Participating **project contributors and maintainers** working to plan, build, and grow those projects.
3. **Consumers of participating projects** such as implementing organizations and end users.

The following chart explores some of the services we offer, and which of these groups can benefit.

Benefit	Funders	Project Contributors	Consumers
Operation of a 3rd-party, neutral “home” for participating projects to minimizes conflicts of interest, reduce single points of failure, and improve trustworthiness	✓	✓	✓
Vetting of mentored & member projects by a Technical Steering Committee (TSC) of industry experts & peers	✓	✓	✓
Project mentoring program that maintains participating project autonomy while adding best practices and industry expertise to increase their maturity	✓	✓	✓
Professional management services shared across participating projects provide a cost-effective way to handle common infrastructure as well as engineering & community management needs	✓	✓	✓
Operation of multi-project & cross-sector community work groups for key areas of need like documentation, software quality best practices, diversity & inclusion, and more	✓	✓	✓
Priority participation in DIAL’s proposed Deliver ICT concept for capacity building & training, connecting open source digital development projects with real-world implementation work	✓	✓	✓
Short-term tactical funding opportunities for high-impact areas of need, via DIAL & partners	✓	✓	
Facilitation in matching participating projects to more longer-term funding opportunities through Sustainability Advisory Groups (SAGs)	✓	✓	
Marketing & advertising work of participating projects through inclusion in DIAL and the Center talks at global digital development & open source events	✓	✓	
Operation of a collaborative community, co-investing in common infrastructure & services, to achieve economies of scale in foundational project support	✓	✓	
Close partnership with the Principles of Digital Development community of implementers and practitioners to improve collaboration with consumers & adopt project best practices		✓	✓
Open source project event planning best practices, toolkits, & assistance/resources		✓	✓
Available add-on professional services on ad-hoc basis for legal, communication, technical architecture, events, monitoring & evaluation, etc.		✓	✓

3.3.3 Applying for Services

Step 1: Become a member

If you are interested in accessing the OSC's shared services for your project, the first step is to become a member. Browse through the mission statement of the OSC and also the sorts of projects we look to partner with, to get a feeling for the kind of projects the program supports. If you think your project might be a fit, *start the membership proposal process* so we can better understand your project. Even if we don't ultimately find a beneficial service offering, you will still gain benefits by going through this process!

Step 2: Identify needed services

Contact the OSC GAB by email at osc@digitalimpactalliance.org. Let us know which project you're working with and what type of services sound correct for your project. We will request more information to follow up, help your project understand available resources, any associated costs, and discuss additional details.

Step 3: Submit a proposal

The GAB will ask your project leadership to submit a formal request for services document, which will be reviewed by the GAB in an upcoming meeting, and scheduled based on available capacity. The GAB will conduct a preliminary evaluation of the project using the *OSC Project Maturity Evaluation* document, which can be used to track the project's growth over time. Your project will be involved at every step to ensure there are no surprises, and to make sure the plans work with your project's needs.

Services are generally prioritized based upon how they will affect your project's increased maturity & impact to those served.

3.4 Available Services Menu

3.4.1 Structural Assessment

The first step in determining the appropriate services to deliver and the specific goals to be achieved is to partner with the project to better understand the structure of the code and community. All contracts for providing individual service modules, lifecycle packages or theme-based packages would begin with some form of structural assessment. The *Self-assessment* and *Intake Evaluation* can aid the thought process during this phase, and provide examples of the sorts of aspects that are considered during this assessment.

3.4.2 Service Modules

All mentorship & consulting services are available on a case-by-case basis as needed by projects. Projects will work with the OSC GAB via the onboarding process to determine the best solution for their specific needs, based upon capacity.

1. Governance assistance
 - (a) License & IP planning - Preparing a project to accept intellectual property contributions (code, documentation, etc.) from others via OSI/FSF licenses, copyright assignment, etc. Understanding the right license for a given project considering their plans & community.
 - (b) Financial/asset stewardship - Review of alternatives and advice for a project's current and future plans, to ensure an appropriate strategy for stewardship of IP and other tangible and non-tangible assets. Development of strategy & tactics for budgeting, fiscal planning, fundraising, financial distribution amongst community members.

- (c) Product management & roadmap - Development of strategy, plans, policies, and processes to develop & maintain software product roadmaps. Ensure full stakeholder participation in all stages of product roadmap lifecycle. Plans, strategies, and tactics for maintaining product feature backlogs & release process.

2. Community assistance

- (a) Contributor onboarding - Design & development of strategies, documentation, and process to recruit individual & organizational project contributors of various types. Monitoring of newcomers to ensure motivations for participation, and adjust programs appropriately.
- (b) Engagement & retention - Development of programs to increase participation of currently-available contributor ranks. Monitoring of exiting or inactive contributors to understand blockers to participation. Develop & deploy programs to ensure continual feedback from contributors.
- (c) Diversity & inclusion - Outreach (directly and by participation in larger initiatives) to under-represented people in technology, open source software development, ICT4D, and other fields. Development of mentorship & education programs to maximize value & ensure optimal experiences.
- (d) Recognition programs - Design, development, implementation, & monitoring of programs to recognize contributors, volunteers, and other community members. Solicitation of and action upon feedback from key community members to ensure their motivations for participation are being met.
- (e) Metrics & evaluation - Design, development, implementation, & execution of metrics plan to measure activity of community and progress toward defined goals. Assistance with preparation of reports to stakeholders & funders regarding project activities.

3. Engineering assistance

- (a) Process Consulting - Helping to establish process around product development, code review and release management. Code review process, for example, would establish rules around who would need to review changes and when, ideal throughput, approval/rejection criteria, etc.
- (b) Interoperability - Researching opportunities to integrate with other projects, as well as standardizing a product's own API, potentially to adhere to well-established open standards.
- (c) Software Development - Providing targeted code spikes to improve maturity, scalability or sustainability of a product. An example could be a test coverage and refactoring effort, or improving deployment/packaging/configuration to be more user-friendly.
- (d) Architectural Research & Systems Engineering - Providing recommendations on high-level component organization of a product, including how to reach higher scale. This could also include doing stress testing to better understand bottlenecks of the existing architecture.

4. Infrastructure assistance

- (a) Communications platforms - Gathering the requirements for the community (geographic distribution, connectivity/platform coverage, language support) and establishing recommendations for best tools and platform "etiquette."
- (b) SQA tools & systems - Providing recommendations on continuous integration and delivery platforms, code coverage, etc. This could also include helping to set up these systems for the project, and training other community members on how to maintain.
- (c) Hosting & DevOps - Working to understand a project's physical infrastructure needs, for web hosting (in the case of SaaS), tool hosting, and demo & testing hosts.
- (d) Documentation Systems - Incorporating auto-generated documentation into the software release cycle, determining best tools that fit the project requirements.

3.4.3 Lifecycle Service Packages

These service packages can be arranged depending on the lifecycle phase of a particular project. By default, all service modules will be scheduled to start and end within a single 1-month period. The services can be renewed or extended for more complicated or extended needs. All packages begin with a structural assessment, to understand the needs unique to each project.

init

For projects that are newly launching, the following services may be most useful.

- Financial/asset stewardship
- License & IP planning
- Product management & roadmap
- Communications platforms

clone

For projects that have established a process and have some users and contributors, but are looking to grow, these services should be considered.

- Contributor onboarding
- Diversity & inclusion
- Code review processes
- Documentation systems & planning

rebase

Older projects may need to re-establish best practices or transition away from previous management structures.

- Product management & roadmap
- Engagement & retention
- Recognition programs

commit

Established, mature products may be looking for a way to scale down their running costs and efforts, finalize documentation and figure out a way to enter “maintenance mode.”

- Financial & asset stewardship
- SQA infrastructure
- Metrics & evaluation
- Testing & continuous delivery

3.4.4 Additional thematic-based programs

These additional programs are available based upon specific contextual needs of a project. As above, they are designed to be completed within a single 1-month period, but can be extended. All packages would also begin with a structural assessment, to understand the needs unique to each project.

Financial stability program

- License & IP planning
- Financial/asset stewardship
- Contributor onboarding
- Code review processes
- Communications platforms

Contributor optimization program

- Engagement & retention
- Diversity & inclusion
- Recognition programs
- Code review processes
- Communications platforms

Product optimization program

- Product management & roadmap
- Metrics & evaluation
- Testing & continuous delivery
- Refactoring
- SQA tools & systems
- Documentation systems & planning

3.5 Catalytic Grantmaking

3.5.1 Purpose

We fund products that are considered public goods in the humanitarian/development space to do foundational work that is often more difficult to fund within the context of a particular project. In general, we fund projects, features or efforts that are well-aligned with the principles for digital development and the mission statement of the OSC. The OSC will offer two rounds of calls for proposals for grants made to interventions around a particular theme, and member projects can also apply for ad hoc grants as part of a larger service offering with the OSC.

3.5.2 The Grants

In this round of thematic funding, DIAL will offer 4 grants of up to \$25K to advance the mission of fostering “healthy, sustainable open-source communities and products”. While we are willing to consider all areas of project need, we anticipate these grants could be to fund high-impact areas, such as:

- Strengthening the project’s foundational base
 - A community coordinator to grow community contributions and involvement
 - A technical writer to improve, consolidate or revise documentation
 - Hardware infrastructure for CI, web hosting, etc.
- Improving the project’s software quality & reliability
 - A code spike to increase automated test coverage
 - A code spike to refactor code smell, making the project more understandable for new contributors
 - A project manager to help groom a technical backlog into tasks that are small, self-contained tasks that are easier for casual contributors
- Tending to often-neglected but high-value areas
 - Better packaging and training materials, to make deployments easier for non-technical people
 - A marketing push, to raise awareness of the product (for both developers and users)

What we don’t plan to fund

- Individuals working independently on non-collaborative projects.
- Proprietary software projects, e.g., software not licensed under an OSI or FSF approved license.

All other things being equal, projects with wider scope (users, purpose, contributor/maintainer organizations) will be favored over projects with narrower scope.

Grants will be made for contributions to multi-stakeholder open source projects. Efforts on existing projects preferred, but we will consider proposals aimed at starting new multi-stakeholder projects (or features), or re-invigorating dormant ones.

Application Process

Step 1: Prepare

Interested applicants are encouraged to browse through the mission statement of the OSC and also the sorts of projects we look to partner with to get a feeling for the kind of projects the program supports.

If you are not already a participating project, we request that you *start the membership proposal process* so we can better understand your project. Even if you are not selected for the grant, you will still gain benefits by going through this process!

Step 2: Discuss

Discuss your questions with other OSC participating members as well, and staff. In the spirit of open source, we encourage public clarification and questions, so others can learn along with you. (TODO: Add discussion media/channels.)

We encourage discussion relevant challenges within your project(s), pain points, ideas for your projects, and relevance to the goals of this round of grant funding.

Step 3: Propose

Prepare a proposal that will be sent to osc@digitalimpactalliance.org. Your proposal should be no longer than 1-2 pages, and should include:

- A proposal executive summary in narrative format,
- Budget and high-level plan of how you'd use the funds, and
- Measurable criteria of success, such as a “definition of done”, milestones, or other goals.

Review Process

1. Your proposal will be reviewed by the OSC Governance Advisory Board, to ensure the basic proposal criteria are included, and making sure your project is an OSC participating member. The reviewers will use the *ref:intake-evaluation* to understand where your project is currently in terms of maturity, practices, and impact, and will write a short narrative evaluation with recommendations to the DIAL funding panel.
2. The GAB will forward all reviews for this round to the funding panel, which consists of DIAL management, along with its recommendations. The
3. Depending on the funds requested and the complexity of the work to be performed, the GAB and/or the DIAL funding panel may seek independent expert review of the proposal. (For example, if the project is focused on health, feedback might be sought from members of the OSC Health Sustainability Advisory Group, or externally from PATH's digital health team, for example. If those “external” reviews raise additional questions, grantseekers are given the opportunity to respond in writing to reviewer comments.
4. Recipients will be announced publicly at the end of the review cycle.

3.6 Summer of Code @ DIAL Open Source Center



Google Summer of Code

The Digital Impact Alliance (DIAL) at United Nations Foundation has launched its Open Source Center to provide a collaborative space for (and professional technical assistance to) open source projects focusing on international development and humanitarian response. The Center assists in the establishment of effective governance, software project management, and contribution models for member projects. It also provides technical, architectural, and programming support for projects; and assists those projects in support, engagement, management of their communities of contributors and implementers.

Google Summer of Code (GSoC) is a **global program that offers post-secondary students an opportunity to be paid for contributing to an open source project over a three month period.** The DIAL Open Source Center intends to serve as an “umbrella organization” to a variety of international development and humanitarian response related projects, to help raise awareness about those projects among student applicants, connect students to meaningful open source work that makes the world a better place, and help increase the maturity & reach of those projects.

The 2019 DIAL Open Source Center (OSC) GSoC coordinator is Michael Downey, the OSC's Director of Community. (downey on Freenode IRC, downey (at) dial (dot) community, but please email gsoc (at) dial (dot) community if you

are a mentor who wishes to contact an admin. Students should almost always visit Getting Started first, and then email gsoc (at) dial (dot) community only if you get stuck.

We have applied to participate in GSoC as an umbrella org for the 2019 season! If you are a current or potential sub-org and need to complete your ideas page, please read the relevant section(s) below. If you are a potential student, please review this information now and check back for sub-orgs and project ideas after GSoC participating organizations are announce on 26 February!

On This Page

- *DIAL Sub-Orgs & Associate Members*
 - *Humanitarian Open Street Map Team (HOT)*
 - *Ushahidi*
 - *mUzima*
 - *Mifos*
 - *LibreHealth*
 - *Open Data Kit*
 - *Public Lab*
- *Former Years DIAL Sub-Orgs*
 - *OpenLMIS*
 - *SUMSarizer*
- *Information for Students*
 - *Students: How to Apply*
- *Important Program Dates*
- *Participating as a Sub-Organization*
 - *Mentors Wanted!*
- *Frequently Asked Questions (FAQ)*
 - *Getting Started*
 - *Communication*
 - *Mentoring*
 - *Other*
- *Getting in Touch*
- *Acknowledgements*

See also:

- *Summer of Code Sub-Org Template*
- *Summer of Code Student Template*

3.6.1 DIAL Sub-Orgs & Associate Members

CURRENT STATUS: Preparing final sub-org and ideas lists! Our sub-orgs are actively developing their ideas lists, so this is the perfect time to get to know them and work on proposal ideas together! Keep watching the sub-org lists below for details, which may be updated as frequently as daily through the start of the GSoC application period.

This section contains information about sub-orgs and their project ideas once they have gotten in touch with the OSC. If you're unsure whether your favourite project will be participating, ask them and encourage them to sign up! If you represent a T4D or HFOSS sub-org and want to be added to the list, read *Participating as a Sub-Organization*, then contact `gsoc (at) dial (dot) community` to be added to this page and get assistance with customizing the *Summer of Code Sub-Org Template* for your specific projects.

OSC participating projects may also taking part in GSoC as “standalone” organizations, such as these last year in 2018, after having participated during previous years. These open source projects did not operate under the OSC umbrella, but they also serve international development and humanitarian response. Please visit their project ideas pages too!

Humanitarian Open Street Map Team (HOT)



The Humanitarian OpenStreetMap Team (HOT) applies the principles of open source and open data sharing for humanitarian response and economic development.

- Project website: <https://www.hotosm.org/>
- Mailing list: <https://lists.openstreetmap.org/listinfo/hot>
- Chat: <https://slack.hotosm.org/>
- Technical coordination resources: <https://github.com/hotosm/tech>
- **GSoC ideas page:** Available in the HOT tech team repo on GitHub

This organization also intends to participate in Outreachy's mid-2019 round: <https://www.outreachy.org/>

Ushahidi



Ushahidi platform is often used for crisis response, human rights reporting, and election monitoring. Ushahidi offers products that enable local observers to submit reports using their mobile phones or the internet, while simultaneously creating a temporal and geospatial archive of events. Ushahidi (Swahili for “testimony”, closely related to shahidi which means “witness”) created a website in the aftermath of Kenya’s disputed 2007 presidential election that collected eyewitness reports of violence reported by email and text message and placed them on a Google Maps map.

The Ushahidi platform has been deployed over 125,000 times in over 160 countries, used by the Obama Campaign for America 2012, the United Nations Department of Field Services and Peacekeeping, in response to the Haiti Earthquake in 2010, to monitor the Nigerian elections in 2011, by the Nepalese army to respond to the earthquake of 2015, in and by local activists groups such as Humanitarian Tracker to monitor violence in the Syrian civil war and HarassMap to help women report on sexual harassment.

- Project website: <http://ushahidi.com/>

- Forum: <http://forums.usahidi.com/>
- Mailing list: <http://list.usahidi.com/>
- IRC chat: <http://irc//irc.freenode.net/#usahidi>
- Getting started as a developer: <https://www.usahidi.com/support/add-code-to-usahidi>
- **GSoC ideas page:** Coming very soon

This organization also intends to participate in Outreachy's mid-2019 round: <https://www.outreachy.org/>

mUzima



mUzima is an open source, Android-based mHealth platform whose current version inter-operates seamlessly with OpenMRS. The Android app supports patient registration, data collection and upload, historical patient data access, cohorts management, patient search, form templates download, alerts and reminders, tele-consultation, and works both online and offline. At the server side, mUzima has modules to support forms management, form data processing, error resolution, and management of consultations.

- Project website: <https://www.muzima.org/>
- Wiki: <https://wiki.muzima.org/display/muzima/muzima>
- IRC chat: <https://www.ircloud.com/#!/ircs://irc.freenode.net:6697/%23muzima-dev>
- Developer Guide: <https://wiki.muzima.org/display/muzima/Developer+Guide>
- **GSoC ideas page:** Coming very soon

This organization also intends to participate in Outreachy's mid-2019 round: <https://www.outreachy.org/>

Mifos



Mifos X is an extended platform for delivering the complete range of financial services needed for an effective financial inclusion solution. As the industry's only open platform for financial inclusion, we provide affordable, adaptable and accessible solutions for any segment of the market, new and small financial institutions can easily start with our community app in a hosted environment, medium and large institutions that are evolving into full-service providers of financial inclusion can use our global network of IT partners to configure a Mifos X solution, and innovators can build and scale entirely new solutions on our API-driven platform.

- Project website: <https://mifos.org/>
- Mailing list: <https://lists.sourceforge.net/lists/admin/mifos-developer>
- Chat: <https://gitter.im/openMF/mifos>
- **GSoC ideas page:** <https://mifosforge.jira.com/wiki/spaces/RES/pages/812810251/Google+Summer+of+Code+2019+Ideas>

This organization also intends to participate in Outreachy's mid-2019 round: <https://www.outreachy.org/>

LibreHealth

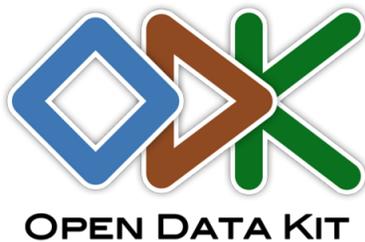


LibreHealth is collaborative community for free & open source software projects in Health IT.

- Project website: <http://librehealth.io/>
- Forum: <https://forums.librehealth.io/tags/gsoc2019>
- Chat: <https://chat.librehealth.io/>
- **GSoC ideas page:** Visit the LibreHealth Forums

This organization also intends to participate in Outreachy's mid-2019 round: <https://www.outreachy.org/>

Open Data Kit



Open Data Kit (ODK) is a free and open-source set of tools which help organizations author, field, and manage mobile data collection solutions.

- Project website: <https://opendatakit.org/>
- Forum: <https://forum.opendatakit.org/tags/gsoc-2019>
- Chat: <http://slack.opendatakit.org/>
- **GSoC ideas page:** View the ODK Ideas List document

Public Lab



Public Lab is a community and non-profit democratizing science to address environmental issues that affect people. In Public Lab, we believe that generating knowledge is a powerful thing. We aim to open research from the exclusive hands of scientific experts. By doing so, communities facing environmental justice issues are able to own the science and advocate for the changes they want to see.

The science, technology and data in Public Lab are community-created and open source. We utilize our open data to advocate for better environmental management, regulations and enforcement. These tools enable people to more easily generate knowledge and share data about community environmental health.

- Project website: <https://publiclab.org/>
- Mailing list: <https://groups.google.com/group/plots-dev>
- Chat: <https://publiclab.org/chat>
- GSoC ideas page: <https://publiclab.org/wiki/gsoc-ideas>

3.6.2 Former Years DIAL Sub-Orgs

These OSC participating projects took part in GSoC during past years as sub-organizations, and serve international development and humanitarian response. Although they are not participating in Google Summer of Code this year, they are always looking for contributions!

OpenLMIS



OpenLMIS is an open source, cloud-based, electronic logistics management information system (LMIS) purpose-built to manage health commodity supply chains. The OpenLMIS initiative incorporates a community-focused approach to develop open source and customizable LMIS systems specifically designed for low-resource settings.

The latest version of OpenLMIS, the version 3 series, uses a microservices architecture deployed with Docker. OpenLMIS is currently deployed in Benin, Côte d'Ivoire, Malawi, Mozambique, Tanzania, Zambia, and Zanzibar where it manages logistics processes in health commodity supply chains for over 10,000 health facilities.

- Project website: <http://openlmis.org/>
- Wiki: <https://openlmis.atlassian.net/wiki/spaces/OP/overview>

- Mailing list: <https://groups.google.com/forum/#!forum/openlmis-dev>
- Slack chat: [Request an invite](#)
- **GSoC ideas page:** [Visit the OpenLMIS Wiki](#)

SUMSarizer

SUMSARIZER

SUMSarizer helps researchers measure impacts of improved cookstoves by using machine learning to turn raw data from stove use monitoring sensors (SUMS) into summaries of cooking events.

- Project website: <http://sumsarizer.com/>
- Forum discussion: <https://forum.osc.dial.community/c/community/soc>
- Developers chat: <https://dial.zulipchat.com/#narrow/stream/OSC.20Summer.20of.20Code>
- **GSoC ideas page:** [Consult the SUMSarizer Wiki](#)

3.6.3 Information for Students

GSoC is basically an open source apprenticeship: students will be paid by Google to work under the guidance of mentors from an open source community. It's a really great opportunity to build new skills, make connections in your community, get experience working with a larger and often distributed team, learn, and, of course, get paid. If you're new to GSoC and what it means to be a student, learn more in this short video:

Students are expected to work around 40 hours a week on their GSoC project. This is essentially a full-time job. Ideally, you should not attempt to do another internship, job, or full-time schooling while you're doing GSoC.

Remember that Google intends this to be a way for new contributors to join the world of open source. The students most likely to be selected are those who are engaged with the community and hoping to continue their involvement for more than just a few months.

To apply, you need to take a look at the mentoring organizations and the ideas that they are willing to sponsor. See the "Ideas" section of this page for our sub-orgs and their project ideas. Typically, you'll choose one of their ideas and work with a mentor to create a project proposal that's good for both you and your chosen open source community. Sometimes, projects are open to new ideas from students, but if you propose something new make especially sure that you work with a mentor to make sure it's a good fit for your community. Unsolicited, un-discussed ideas are less likely to get accepted.

Note that the DIAL Open Source Center (OSC) is an "umbrella organization" which means that our team is actually a group of projects that work together to do Google Summer of Code. If you're going to apply with us, you'll need to choose from one of those teams, because that defines which mentors will be helping you with your applications. **Applications without any sub-org and mentor to evaluate them will be rejected.** You can work with more than one sub-org while you're figuring out what you want to do, but you can only accept one "job offer". Here's some resources so you can read up more on how to be an awesome student:

- [The GSoC student Guide](#) – This is a guide written by mentors and former students. It covers many questions that most students ask us. Please read it before asking any questions on the mailing list or IRC if you can! New students in particular might want to read the section [Am I Good Enough?](#)
- [Google's list of resources](#) – Note especially the [Frequently Asked Questions \(FAQ\)](#) which does in fact answer 99% of the questions students ask.

- Our OSC Summer of Code *Frequently Asked Questions (FAQ)* will answer the questions that we most often get about OSC projects. You might want to see “How do I choose a project or a sub-org?” or “How many slots does OSC get?”

Students: How to Apply

Communication is probably the most important part of the application process. Talk to the mentors and other developers, listen when they give you advice, and demonstrate that you’ve understood by incorporating their feedback into what you’re proposing. We reject a lot of students who haven’t listened to mentor feedback.

If you’re interested in how to prepare a strong proposal, take a look at these tips from past mentors:

Short application checklist:

1. Read the links and instructions given on this page – All of it! we’ve tried to give you all the information you need to be an awesome student applicant.
2. Choose a sub-org from our list. Applications not associated with a sub-org typically get rejected.
3. Talk to your prospective mentors about what they expect of student applicants and get help from them to refine your project ideas. Listening to your mentors’ recommendations is very important at this stage!
4. Prepare a patch or merge/pull request for that sub-org.
5. Set up a blog where you will keep track of your GSoC progress.
6. Write your application (with help from your mentors!) Make sure to include the sub-org name in the title so your mentors can find it in the system, and make it easy for your mentors to comment on your doc. e.g., Enable comments if you’re using Google Docs. See *Summer of Code Student Template* for the application template with notes and tips.
7. Submit your application to Google **before** the deadline. We strongly recommend you submit a few days early in case you have internet problems or the system is down. Google does not extend this deadline, so it’s best to be prepared early! You can edit your application up until the system closes.

3.6.4 Important Program Dates

Next Deadline: To be announced after acceptance!

- **February 26:** Google announces list of accepted mentoring organizations.
- **March 25 - April 9:** Students register & submit applications to organizations no later than April 9 at 11:00 PDT.
- **May 6:** Student projects announced; students & mentors start planning their projects and milestones.
- **May 27 - August 19:** Students work on their Google Summer of Code projects.

Other dates and deadlines for 2019 will be added once we get accepted, so check back in February.

Please note [Google’s official GSoC dates and deadlines](#). It is the final word when it comes to any deadlines.

In general, OSC will ask mentors to do things 48h before the Google deadline. This allows our admins time to make sure that evaluations, etc. are complete and ready for Google when their deadline comes. Student deadlines remain the same, although getting things done earlier is never a bad idea!

3.6.5 Participating as a Sub-Organization

First of all, make sure you understand what's involved and the benefits of participating in Google Summer of Code. Watch this short video first, and drop us a line at [gsoc \(at\) dial \(dot\) community](mailto:gsoc@ dial .community) if you have questions!

To participate under the DIAL Open Source Center (OSC) umbrella, a sub-organization must do the following:

1. Be an open source project that is focused on international development, humanitarian response, or other such project that is aligned to focus on [the DIAL Open Source Center challenge](#).
2. Meets [Google's requirements](#) for GSoC.
3. Have one sub-org admin and at least two mentors who are willing to commit to the full GSoC period. (The admin can also be a mentor, but the more people, the better!)
4. All sub-org admins and mentors agree to follow the *OSC Code of Conduct* for the duration of the program.
5. Send an email indicating interest to [gsoc \(at\) dial \(dot\) community](mailto:gsoc@ dial .community), before the announced deadline. Exceptions can be made if you get an amazing student applicant later and want to sign up just for them.
6. Have a good ideas page. See [Summer of Code Sub-Org Template](#) for an example. Getting a really great page sometimes takes a few rounds of revisions. We will work with you to make sure your page is ready! Once you're ready for review, you can send request to be added to this page.
7. Be able to handle meeting deadlines and following both Google and OSC's rules. We try to send important reminders for big deadlines, but we only have limited volunteer time for nagging and cajoling. Groups that cause repeated problems may be asked to take time off to limit volunteer burnout.

We can't promise to take everyone who meets those criteria, but we do try to take any eligible project/organization that we feel will give the students a great experience. The OSC Director of Community has final say in which projects participate under the OSC umbrella, but please send any queries to the team at [gsoc \(at\) dial \(dot\) community](mailto:gsoc@ dial .community) to make sure we're all on the same page.

T4D, HFOSS, and other international development focused projects are welcome and encouraged to apply as separate mentoring organizations directly with Google. We're happy to help you in any way we can and we don't mind being your backup plan. We're also happy to help advertise related organizations not under our umbrella – we want students to find projects that best suit them!

Mentors Wanted!

Interested in volunteering with the DIAL Open Source Center or one of our participating projects?

The biggest job is mentoring students: Mentoring a student as a primary mentor can be a pretty big time commitment. We recommend around 0-10 hours a week on average for the 3 months of the program, with more time at the beginning and less once the student learns to work independently. It's a very rewarding chance to give a student an open source apprenticeship. Mentorship happens in teams, so even if all you can handle is a few code reviews or taking over for a week while someone's on vacation, our projects still love your help.

The easiest way to become a mentor is to be part of one of the sub-orgs that plan to be involved, so get in touch with them directly if you want to help. If you're part of a group that would like to participate as a sub-org, please read the section for sub-orgs below.

Google produced a great video with advice on being a great mentor. Take a look:

But our projects also need other volunteers! We're also looking for friendly community members to help with other tasks! We'd love to have more people available on IRC, mailing lists, and forums to answer student and mentor questions in various time zones. We are particularly looking for volunteers who can read and comment on student blogs, remind students if they haven't posted, and promote the work our students do to the larger open source & international development community. Or maybe you have another skill set you'd like to contribute? (Proofreading? Recruiting diverse student applicants?) If you want to help, we'd be happy to find a way to make that happen!

If you'd like to volunteer, get in touch with a sub-org admin or email our GSoC team at `admins@gsoc.dial.community`.

3.6.6 Frequently Asked Questions (FAQ)

Getting Started

How do I get started in open source?

Here are the top things you can do to get started in free and open source software:

1. Choose an organization to work with.

- There are thousands of open source software projects, and the list of projects focused on international development is also long. You need to narrow down the list before you can get help or do much that's useful. See "How do I choose a project or sub-org?" for ideas on how to do that.
- Any open source experience will help you prepare for GSoC, so don't worry too much about what project you try first and don't be afraid to change your mind!
- For GSoC applications, you'll need to choose from the list of accepted OSC sub-orgs, or Google's master list of participating orgs. If your favorite group isn't on the list, contact them to see if they're interested in participating. Student applications not associated with a known sub-org are usually rejected because we don't have mentors available.

2. Set up your own development environment. This will vary depending on what project(s) you are interested in, but they should be able to help you.

- Be sure to document what you do so you can remember it later, and so you can help others if they get stuck! And if you get stuck, don't be afraid to ask for help.

3. Start communicating with the developers. Join the mailing list, IRC channel, or any other communication channels the developers use.

- In almost all cases, you should **communicate in public** rather than in private. GSoC is a busy time for many developers and many beginner questions get asked repeatedly. Help keep your devs less stressed out by reading what they've written already and making it easier for them to have a record of the things they've answered. You can use a pseudonym/nickname if you want. Also, search those archives to make sure you're not asking something that's just been asked by someone else!
- If you want to make the best first impressions, DO NOT start with "Dear Sir." and DO NOT ask to ask. See our *Frequently Asked Questions (FAQ)* for details.

4. Find some beginner-friendly bugs and try to fix them. Many projects have these tagged as "easy" "bite-size" or "beginner-friendly".

- Note that if you apply as a student with the OSC you will be asked to submit a code sample – generally code related to your project. A few fixed bugs with code accepted upstream will make your application look great!
- Remember, competition for easy bugs is very high during GSoC so it can be hard to find one that's tagged. If you don't see anything from your search, read through the bugs and choose a few that sound like something you can fix. Remember to ask for help if you get stuck for too long, "I'm a new contributor and was trying to work on bug #123456. I have a question about how to..." – if people can't help, sometimes they will be able to suggest another bug which would be more beginner-suitable.
- Other "easy" bug ideas: find typos and fix them. Set up new tests – even if the project doesn't need the first one you write, practice writing test cases is useful for later. Talk to your org's community to find out more about what they're doing with testing.

5. **Find bugs and report them.**

- Hopefully you won't encounter too many, but it's always a good idea to get familiar with your project's bug reporting process.

6. **Help with documentation. As a beginner in your project, you're going to see things that are confusing that more experienced people would not.**

- Take advantage of your beginner mindset and make sure to document anything you think is missing!

7. **Help others. This is a great idea for a lot of reasons:**

- Explaining things can help you learn them better.
- Demonstrating your skills as a good community member can make you more memorable when your mentors have to choose candidates.
- Being helpful makes your community a better place!

How do I choose a project or sub-org?

Choosing a project is a pretty personal choice. You should choose something you want to work on, and none of us can tell you exactly what that would be! But here's a few questions you might want to ask yourself to help figure that out:

- **How do you want to change the world?** Do you want to help people learn more? Communicate better? Understand our world better? With the DIAL Open Source Center, all of our projects are designed to help improve communities and peoples' lives, so you'll have choices!
- **What would you like to learn?** GSoC is meant to be a bit of a learning opportunity. Have you always wanted to be more involved with health? Data? Visualization? Education? See which projects might help you improve your skills.
- **Who do you like working with?** Hang out where the developers do and get to know some of your potential mentors. Which developers inspire you?
- **How do you like to communicate?** Do you like realtime chat communication? Perhaps you should choose a project with mentors in a time zone close to you. Do you like asynchronous communication on mailing lists or forums? Find a group with active discussions. Communication is a big part of Summer of Code (and really any open source development in a team!) so finding a team that works the way you want to work can make your experience more awesome.

A list of sub-orgs for this year will be published on this site.

If you're chosen as a GSoC student, you're going to be expected to make some decisions on your own, so you can make a better first impression on mentors by showing that you're able to narrow down your field of choices!

What do I need to know to participate in Summer of Code with OSC?

The answer to this depends a lot on the project you choose. We have a range of projects, from beginner to advanced. Every sub orgs expects different things from their students. Maybe you'll need to know a bit about machine learning, or email, or image processing. The best answer to this question is, "always ask your mentors what you will need to know" for a specific project.

But a lot of people ask early on because they want to be sort of generically ready, but they're not sure what they want to do yet. So the above answer is not always super helpful.

In that case, here's a list of a few things that are useful for most OSC projects:

- **You must have some experience with software development.** You can be a beginner, but practicing in advance is good! And there are a lot more projects available for students who are reasonably used to a project's specific language, so more practice means you'll have more project options.
- **You need to feel comfortable asking questions,** because we're going to expect you to ask if you don't understand something.
- **You should be comfortable communicating your ideas to others in public.** Most projects have public mailing lists or forums, and would prefer if you use them. OSC students will also be asked to blog about their work over the summer. You can use a pseudonym (nickname) if that works best for you. Google will need to know who you are to pay you, but we just need something to call you.
- **You probably want some experience with version control.** We have a lot of projects that use different tools, such as Git, Mercurial, or Subversion, and you can find out which one your project uses in advance and practice using it on your schoolwork or personal projects to get used to it.

Communication

What does “don't ask to ask” mean?

You'll hear this phrase sometimes on IRC or other chat systems, and it means, “Please just ask your question, don't say something like ‘can I ask a question?’ first.”

Why? Developers are often pretty busy, and if you just ask the question, someone can jump in the minute they see your message with the answer or direct you to folk who can answer it better.

If you ask “can I ask a question?” you're basically just waiting for someone to say “yes” before any useful information is communicated. Many folk consider this slow, annoying, and perhaps even rude. Save everyone (including yourself!) some time and just ask the question right from the start. Culturally speaking, in open source projects it's generally ok launch right in to a question on IRC; you don't even have to say hi first!

What should I do if no one answers my question?

- Be patient. If you're on IRC or another chat tool, stick around for an hour or so (you can do something else, just leave the window open and check back occasionally) and see if someone gets back to you. If they don't, try posting to the forum or mailing list. (It's possible all the developers are asleep!) You should give people around 24-48h to answer before worrying too much about it.
- Make sure you're asking in the best place. One common mistake students make is to contact individual developers rather than asking on a public mailing list or a public IRC/chat channel. You want as many people as possible to see your questions, so try not to be shy! (Don't worry about looking too much like a newbie – all of us were new once!) Sometimes projects have different lists/IRC channels/forums/bug queues for different types of questions. If you're not sure, do feel free to follow up your question with something like, “Hey, I haven't gotten an answer on this. Is there somewhere better I could post it or more information you need to help?”
- Try giving more information. If you've hit a bug, try to give the error message and information about your setup and information about what you've already tried. If you're trying to find a bit of documentation, indicate where you've already looked. And again, “Hey, I haven't got an answer; what other information could I provide to help debug this problem?” is usually a reasonable follow-up if you're not sure what people might need.
- If you're really having trouble getting in touch with your mentors, talk to the OSC GSoC team emailing gsoc (at) dial (dot) community. The GSoC org admins should have contact info for mentors with each project and can help connect you. (Note: Please don't complain that you can't get in touch with us on the general Google lists or the global #gsoc IRC channel. They're just going to redirect you to the OSC org admins anyhow!)

How should I address my emails?

(Or, “Why shouldn’t I start my emails with ‘Dear Sir?’”)

If you want to make the best first impression, **do not start emails with “Dear Sir.”** OSC has many mentors who are female and/or prefer other forms of address. We realize you’re trying to be polite, but “Dear Sir” is often perceived in our communities as alienating, rude or simply too formal and off-putting.

Try “Dear developers” or “Dear mentors” if you’re sending a general email. If you’re addressing a specific person, use the name or nickname that they use on their emails. Culturally speaking, first names or chosen nicknames are fine for most open source projects.

Mentoring

What does it take to be a mentor?

- We expect around a 0-10hr/week commitment, which sounds scary, but it’s not actually that variable. You usually spend up to lots of time for the first few weeks, where you’re fleshing out your ideas page, discussing projects with many students, and selecting students from their proposals. After students are selected, it becomes more like a 1hr commitment per week for a weekly meeting, and maybe a few more hours here and there for code review or questions. (That depends on your student: experienced students may need very little supervision, inexperienced students may need more. It also depends on you: You and your co-mentor(s) select the student and project you mentor, so you can choose according to the time commitment you have. Some mentors even do pair programming with their students!)
- We want at least two mentors per project, so hopefully no one ever gets overwhelmed and feels like they’re always on call. Google does ask that we try to answer questions within 48h so students can’t get stuck for too long. Remember, no one mentor has to know all the answers.
- We recommend at least one mentor has a weekly 1hr meeting with the student so they get to know each other, keep everyone on track, and give a chance to talk about other stuff. Lots of students have questions about jobs, courses, architecture, open source, etc. and it’s nice to have someone to talk to). Some weeks this meeting may be the only mentoring time needed.
- Mentors don’t have to be the “Best At Everything”. A lot of what mentors do is keep students on track and keep them from getting stuck for too long. Sometimes that means just knowing who to ask or where to look rather than knowing the answer yourself. In an ideal world, at least one mentor can answer at least basic architectural questions and knows how to get code accepted upstream, though.
- Mentors do have to do multiple evaluations on the student, two mid-terms and one at the end. (only one evaluation per student per period, though, so only one mentor needs to do this). There’s a few questions about how the student is doing and then a pass/fail that determines if the student gets paid and continues in the program.

Other

How many slots does OSC get? How many slots does project X get?

We don’t know our slot allocation until Google announces them, and Google bases their numbers on the number of students we tell them we want. The more great applications we have, the more slots we’ll request. So rather than worrying about the number of slots, you should be aiming to be such a memorable and great prospective student that your sub-org will definitely request a slot with you in mind.

For sub-orgs, new groups working with us usually get 1-2 slots, experienced sub-orgs may be granted as many as they can comfortably mentor at the discretion of the org admins. The maximum number will likely be close to the total

number of mentors divided by two, but the actual number requested depends on which students the org specifically wants to accept after they've done an initial review of the applications.

We anticipate being more limited by the matching of mentors with truly excellent students.

3.6.7 Getting in Touch

- Please note that *the OSC has a Community Code of Conduct* and mentors and students working with the OSC are asked to abide by it as members of the community.
- Sign up to our forum at <https://forum.osc.dial.community/> list to get updates, reminders, and to discuss questions.
- <https://dial.zulipchat.com> is our real-time chat service. Zulip is an open source project similar to IRC or Slack. Please visit the “#OSC Summer of Code” channel with questions or ideas!
- Found a typo? Want to improve this page? Use the “Edit on GitLab” link above and submit a merge request!
- To get in touch with people from a specific sub-org, check their ideas page listing.

Please try to read all the information on this page before asking a question. We have tried to answer a lot of common questions in advance!

Remember to be patient: Our mentors generally have day-jobs and are not always paying attention to chat, mailing lists, or forums. (This is especially true during GSoC off-season. Expect more active mentors after Google's announcement of organizations.) Please ask questions directly on channel (you don't need to introduce yourself or say hi first) and please be patient while waiting for an answer. You could wind up waiting an hour or much longer for “real-time” answers if all the mentors are in meetings at work or otherwise occupied. If you can't stay that long, stay as long as you can and then send email to the mailing list instead so mentors have some way to reach you. We try to answer emails within 48h.

For mentors: The OSC GSoC team can be reached at `gsoc (at) dial (dot) community` if you or students have questions about participating.

3.6.8 Acknowledgements

This work was adapted from “Google Summer of Code 2018 @ the Python Software Foundation” by Python Software Foundation, used under the Creative Commons 4.0 International Attribution License (CC BY 4.0). Our umbrella org strategy has also been adapted from the time-tested policies, processes, and content from this excellent team. They have also provided mentorship and advice to our umbrella program. Thank you!

3.7 Summer of Code Sub-Org Template

Important: Please make sure you've reviewed our *Summer of Code @ DIAL Open Source Center* documentation before starting your ideas page.

There are not very many strict requirements for Google Summer of Code Ideas pages, but there are some things that students often ask us for. This page is intended as a starting template for organizations so you don't forget those things.

Note: In the past, many orgs have been rejected because their ideas pages were offline when Google checked. Make sure your ideas page is hosted somewhere that Google's Open Source Programs Office will be able to access when they check!

3.7.1 About MySubOrg

Tell the students a bit about your organization. Here's some questions you might want to answer:

- What software are you creating?
- Why is it interesting?
- Who uses it?
- What languages is it written in?
- How is it going to change the world?

3.7.2 Contacting MySubOrg

- IRC/Chat system URL/directions/coordinates
- Mailing list and/or forum info

Be sure to list contact methods you actually use and will have mentors monitoring!

Include any special instructions/info about communicating, e.g.:

- What time zones are your mentors in?
- Do you prefer it if GSoC students introduce themselves first (where?) or just dive in?
- Are there any common mistakes students make when making a first impression?

3.7.3 Getting Started as an Applicant

Links to setup instructions, generally for “new developers”, goes here. Some suggested things to answer:

- Where is the link to a setup guide for new developers?
- Are there any unusual libraries/applications that need to be installed first?
- What type of source control do you use? (include links to help and setup guides!)
- What's the process for submitting your first bug fix?
- Where should students look to find easy bugs to try out?

3.7.4 Writing your GSoC application

Links to (and advice about) applications and the application template goes here. **Remind your students that your sub-org name must be in the title of their applications!** As a sub org, all students will submit an application to the umbrella org.

- Here's a link to the master *Summer of Code Student Template* for DIAL Open Source Center.

3.7.5 20xx Project Ideas

NOTE: You should usually have at least a couple of project ideas, ranging in difficulty from beginner to expert. Please do try to have at least one, preferably several beginner tasks: GSoC gets a lot of students with minimal open source experience who feel very discouraged (and sometimes even complain to Google) if orgs don't any have projects at their level.

1. Project “Name”

- **Project description:** Make sure you have a high-level description that any student can understand, as well as deeper details.
- **Skills:** programming languages? specific domain knowledge?
- **Difficulty level:** Easy/Intermediate/Hard classification. Students ask for this info frequently to help them narrow down their choices. Difficulty levels are something Google wants to see, so **these aren’t optional**; make your best guess.
- **Related Readings/Links:** Was there a mailing list discussion about this topic? Other documentation? Standards you want the students to read first? Bug reports or feature requests?
- **Potential mentors:** A list of mentors likely to be involved with this project, so students know who to look for on chat/discussion venues if they have questions. If you’ve had trouble with students overwhelming specific mentors, feel free to re-iterate here if students should contact the mailing list to reach all mentors.

2. Project “Name”

Same pattern as the previous project, etc. Unless there’s a compelling reason to sort in some other order, **ideas should be ordered approximately from easiest to hardest**.

3.8 Summer of Code Student Template

Important: Please make sure you’ve reviewed our overall *Summer of Code @ DIAL Open Source Center* documentation & your sub-org’s ideas page (and any other documentation!) before starting your application.

Unless otherwise indicated, all fields on this form are required. Please contact your project mentor(s) if you have any questions, and to make sure that your application is complete after it is submitted. Ideally, a GSoC application is a **collaborative** process, so please adjust based on any feedback you are given, and start early so you can get that feedback!

3.8.1 Your Project Proposal Title

Use a good project title in Google’s submission system! Your project title should explain in a few words what you plan to do and (most importantly) **always include the name of your sub-org**. Examples: “FooSys: Refactor window focusing” or “BarApp: BazPlot Integration.”

The DIAL Open Source Center may get a large number of submissions in a single year, and it can be very hard for mentors to find your projects if they all have generic titles like “my gsoc application.” A good title can help you get early feedback that will make you more likely to get accepted, and a bad title could result in your application getting marked as spam and ignored!

Sub-org Information

- Which OSC sub-org are you applying to work with? (e.g. FooSys, BarApp)

NOTE: You **MUST** specify this. If we have to guess, your application could be rejected in favor of students who followed instructions. You must apply to work with a valid sub-org that is signed up with the DIAL Open Source Center to participate this year. If they’re not signed up, we have no mentors for you, and will likely reject your application.

Student Information

- Name:
- Alternate names: (e.g. GitHub username, IRC/chat nickname, any other preferred names.)
- Email:
- Telephone with international country code:
- Time Zone: (e.g., “East Africa Time, UTC+3”.)
- Blog RSS Feed URL:

You will be **required** to blog about your GSoC experience at least every 2 weeks through the program. An RSS feed is used to aggregate student blogs; we recommend using a tag like “gsoc” if you use this blog for anything other than GSoC.

Code Sample

- Link to a patch/code sample, preferably code you have already submitted to your sub-org as part of a bug/ticket/issue.

Note: The DIAL Open Source Center requires all students to submit a code contribution before being accepted. This contribution does not need to be accepted and merged into your project, but it does need to be online and available for potential mentors to inspect. Contact your mentors if you have questions about what constitutes an appropriate sample. Applications without a valid code sample will be rejected. The code sample must be an example of your own work.

Project Info

- Proposal Title: - The name of your proposal. This should explain in a few words what you plan to do and include the name of your sub-org, e.g., “FooSys: Refactor window focusing” or “BarApp: BazPlot Integration.” (Including the name of your sub-org makes it much easier for mentors to find your proposal!)
- Proposal Abstract: - A short description of your proposed project
- Proposal Detailed Description/Timeline - Please include timeline with milestones, preferably weekly ones. You may wish to read the GSoC student guide which includes several examples of good proposals with timelines.

Note: Any pre-work such as setup and reading documentation should take place during the official GSoC Community Bonding Period, not after coding has started. Consult the official GSoC timeline for details.

Other Commitments

- Do you have any other commitments during the main GSoC time period? - We don’t penalize students for needing adjustments to schedule if they’re up-front about them and have a plan to mitigate any issues. However, we *have* failed students for lying about their availability and subsequently falling behind in their work. Be honest!
- Do you have exams or classes that overlap with this period?
- Do you plan to apply for or have any other jobs or internships during this period? - This is highly NOT RECOMMENDED as GSoC is intended to be a full-time job, but sometimes if a student is starting or finishing an internship with a week or two overlap something can be worked out.
- Do you have any other short term commitments during this period? (e.g., Family wedding, conference, volunteer projects, planned vacation days.)

- Have you applied with any other organizations? If so, do you have a preferred project/org? (This will help us in the event that more than one organization decides they wish to accept your proposal.)

Optional Information

This additional information isn't needed by the OSC, but can help your sub-orgs learn more about you. All fields in this extra information section are optional.

- Link to resume:
- University info - University Name: - Major: - Current Year and Expected Graduation date: - Degree (e.g. BSc, PhD):
- Other Contact info: - Alternate contact info in case your primary email above stops working: - Homepage: - Instant messaging: - Twitter:
- Don't forget to add any other information requested by sub-orgs here.

3.9 OSC Project Self-Assessment

One of the benefits of participating in the DIAL Open Source Center is to bring a higher level of maturity and impact to your T4D open source project. This self-assessment is designed to start your thinking process about what you may be doing well currently, and potential areas to focus on.

Participation in the OSC can help you with some or all of these areas! You need not feel guilty about not having some or many areas "under control". And some may not be relevant to your project.

Once you've gone through this self-assessment exercise with your fellow project maintainers (if any), your next step is to prepare for the OSC Membership Proposal process.

3.9.1 Potential needs & services

For each of the items below, mark whether your project currently has effort ongoing, if you want to do so, or if you don't think that item is necessary for your project.

	Have	Want	Don't Need
Product strategy			
Product vision/roadmap			
Product Management/Customer Engagement			
Product Coordination with T4D Community			
Architecture/High-level Design			
Agile/Process Management			
Contributor/backlog management			
Software development			
Mentoring			
Advisory board operation			
Marketing program organization			
Volunteer matchmaking/management			
Conflict arbitration			
Community outreach			
Community policy consultation			
Incubation process management			
External communications			
Corporate compliance			
Financial Services			
Business development			
Fundraising			
Marketing/advertising			

3.10 OSC Project Membership Proposal

3.10.1 Motivation for Membership

- **Point of Contact:** Who should be the primary point of contact as your project is evaluated by the OSC GAB? Provide a name, affiliations (if any), email address, and primary time zone.
- **Rationale:** Why does your project want to join the OSC? Specifically, what benefits do you expect to take advantage of immediately and within a few years?
- **Alternatives:** OSC does encourage projects to apply to evaluate different service & hosting strategies to find the best fit. Does your project have an application pending with any other similar organization? What do you see as the pros and cons of the various organizations you've applied to?
- **Sponsor:** Please provide a name and contact details of one or more people in the OSC community with whom you have discussed your project and its potential participation.
- **Community Feedback:** Describe any specific areas of concern (and areas of support) that were raised during preliminary discussions about joining the OSC. These could include community, governance, legal, or technical concerns, among any others.

3.10.2 Project Overview

- **Description:** Please give a detailed description of the project, including relevant URLs, target platforms, package availability, SaaS offerings, etc.
- **Status:** Which lifecycle phase would you consider your project? Examples include: Idea/Proposal, Startup, Active, Deprecated, End-of-Life. Explain why you chose the phase you did.

- **Competition:** Why is this project better at solving a problem compared to other “competing” projects attempting to address similar problems?
- **Context:** Which other projects, if any, is this project derived from? What other projects, if any, is it related to?

3.10.3 Legal & Intellectual Property

- **Licenses:** What FLOSS License(s) does your project use? Please include the primary license, and list other licenses for code that is included. (e.g., “The project as a whole is GPLv3-or-later, but about a dozen files in the directory src/external/ are under the Apache-2.0 license”). Please be sure to include information on documentation licensing as well as software licensing.
- **Trademarks:** Who currently holds your projects’ trademarks, if any? (Consider both registered trademarks and those built through common use.) When was your project’s name first used, and who used it?
- **Logo:** Does your project have a logo? If so, who drew it, when did they draw it, where is it displayed and what is its license? - **Patents:** Are you aware of anyone in your project, individual or company, holding a patent in any jurisdiction that are in any way related to your project?
- **Disputes:** Has your project ever had legal trouble, been involved in legal proceedings or received a letter accusing your project of patent, copyright, trademark or other types of infringement?

3.10.4 Financial

- **Accounting:** Have you ever had funds held by the project, or by any individual on behalf of the project? How and for what did you spend those funds? Are there funds remaining? If so, who is holding them now?
- **Fundraising:** Do you have any ongoing fundraising programs for your project? How do they operate, and how much funding is brought in through these mechanisms currently? Where do you expect most of your donor base to be geographically?
- **Expenses:** Going forward, once inside the OSC, how do you expect to spend funds that you raise? What types of activity do you want to ask the OSC to lead on your behalf? Where geographically do you want those activities to take place?
- **Co-Promotion:** Is your project able and willing to participate in fundraising campaigns with the OSC on an annual or perhaps more frequent basis?
- **Debt:** Does your project owe funds to anyone?

3.10.5 Community

- **History:** Please give a brief history of the project, focusing on how the community developed and the general health of the community. Be sure to include information on any forks or other disputes that have occurred in the community.
- **Governance:** Please explain how your project is governed. Who makes the decisions in the project? How do you resolve disputes, particularly about non-code issues?
- **Affiliations & Partnerships:** Does your project have any existing for-profit or non-profit affiliations, funding relationships, or other agreements between the project and/or key leaders of your project and other organizations? Has the project had such affiliations in the past? Please list of all of them in detail and explain their nature. Even tangential affiliations and relationships, or potential affiliations that you plan to create should be included.
- **Users:** Approximately how many users does your project have, and what items lead you to believe your user base is of a particular size (e.g., post counts to your user mailing list, survey results, etc.)?

- **Contributors:** Please list the names, email addresses, and affiliations (e.g., employer) of key developers and major contributors. Include both current and past contributors and developers. Please include date ranges of when those developers/contributors were active. Please make this list as extensive and complete as possible. You need not include every last person who sent one patch, but please include at least those who regularly sent patches or were/are regular contributors. If your project has contributors who have been inactive for more than five years, you need only to list such inactive contributors if they made substantial contributions.
- **Other Information:** Please include any other pertinent information not given above that you feel we should review with your application.

3.10.6 Technical Backgrounder

As part of our assessment, we may want to explore more deeply your project's technical architecture & solution design. To assist, please several detailed paragraphs discussing how your project attempts to alleviate the problems described in the earlier sections. The following suggested discussion points may help you get started. Depending on relevancy, you need not describe all of these items, nor limit your discussion to them. Consider:

- Transactions including types, confidentiality, signing, traceability, identity of participants, contracts, scripts, etc.
- Effects on user-facing clients that help with transaction formation.
- Effects on the network, throughput, visibility to other participants, changes in standards/protocols (if any), criteria for network participation, etc.
- Backward compatibility evaluation.
- Rough design and scenarios on the probable effects, if any.
- Traceability & testing criteria to gauge effects of project on problem area.
- Proposed license of project codebase, including license of any dependencies.
- Evaluation of any trademarks used in the project name or codebase.
- Estimation of effort and resources needed to launch & maintain project, along with timeline of development.
- Description of how the software/project would be hosted/tested by a user, how to deploy and use, how verify it works correctly.
- References and citations, if any.
- Success criteria: How do we know that the project is successful? Suggest specific & measurable criteria if possible. Make references to successor projects that this project may enable, if any.

3.11 OSC Project Maturity Evaluation

3.11.1 Overview

The goal of this maturity model is to describe how OSC projects operate, in a concise and high-level way. It is used as one of the evaluation tools for OSC membership, service, and grant-making decisions. Most importantly, it's used to describe where individual open source projects in the OSC are on the road to becoming more mature and adopting best practices.

It is meant to be usable outside of the OSC as well, for projects that might want to adopt some or all of these principles. Projects that envision becoming an OSC member might start working towards this to prepare for their move.

It does not describe all the details of how our projects operate, but aims to capture the best practices of how successful & mature open source projects operate, and point to additional information where needed. To keep the main model as concise as possible we use footnotes for anything that's not part of the core model.

Contrary to other maturity models, we do not define staged partial compliance levels. A mature project complies with all the elements of this model, and other projects are welcome to pick and choose the elements that suit their goals.

Note that we try to avoid using the word “must” below. The model describes the state of a mature project, as opposed to a set of rules.

3.11.2 Maturity Model

Each item in the model has a unique ID to allow them to be easily referenced elsewhere.

Software Code

- **CD10** The project produces Open Source software, for distribution to the public at no charge.¹
- **CD20** The project’s code is easily discoverable and publicly accessible.
- **CD30** The code can be built in a reproducible way using widely available standard tools.
- **CD40** The full history of the project’s code is available via a source code control system, in a way that allows any released version to be recreated.
- **CD50** The provenance of each line of code is established via the source code control system, in a reliable way based on strong authentication of the committer. When third-party contributions are committed, commit messages provide reliable information about the code provenance.²
- **CD60** The code contains README, NOTICE, and CONTRIBUTING files (or README sections).

Licenses and Copyright

- **LC10** The code is released under one of the preferred copyleft licenses explained in our *Licensing Principles*.
- **LC20** Libraries that are mandatory dependencies of the project’s code do not create more restrictions than the project’s license does.^{3,4}
- **LC30** The libraries mentioned in LC20 are available as Open Source software.
- **LC40** Committers are bound by an Individual Contributor Agreement (the “Apache iCLA” being an example) that defines which code they are allowed to commit and how they need to identify code that is not their own.
- **LC50** The copyright ownership of everything that the project produces is clearly defined and documented.⁵
- **LC60** The project name has been checked for trademark issues.

Software Releases

- **RE10** Releases consist of source code, distributed using standard and open archive formats that are expected to stay readable in the long term.⁶
- **RE30** Releases are signed and/or distributed along with digests that can be reliably used to validate the downloaded archives.

¹ “For distribution to the public at no charge” is straight from the from the ASF Bylaws at <http://apache.org/foundation/bylaws.html>.

² See also LC40.

³ It’s ok for platforms (like a runtime used to execute our code) to have different licenses as long as they don’t impose reciprocal licensing on what we are distributing.

⁴ <http://apache.org/legal/resolved.html> has information about acceptable licenses for third-party dependencies

⁵ In Apache projects, the ASF owns the copyright for the collective work, i.e. the project’s releases. Contributors retain copyright on their contributions but grant the ASF a perpetual copyright license for them.

⁶ See <http://www.apache.org/dev/release.html> for more info on Apache releases

- **RE40** Convenience binaries can be distributed alongside source code but they are not official releases – they are just a convenience provided with no guarantee.
- **RE50** The release process is documented and repeatable to the extent that someone new to the project is able to independently generate the complete set of artifacts required for a release.
- **RE60** Release plans are developed and executed in public by the community, and approved by the project’s governing body.
- **RE70** The project should use the OSC standard release taxonomy, once that is agreed upon.
- **RE80** The project has released at least one version.

Software Quality

- **QU10** The project is open and honest about the quality of its code. Various levels of quality and maturity for various modules are natural and acceptable as long as they are clearly communicated.
- **QU20** The project puts a very high priority on producing secure software.⁷
- **QU30** The project provides a well-documented channel to report security issues, along with a documented way of responding to them.⁸
- **QU40** The project puts a high priority on backwards compatibility and aims to document any incompatible changes and provide tools and documentation to help users transition to new features.
- **QU50** The project strives to respond to documented bug reports in a timely manner.
- **QU60** The project must include a unit and integration test suite of sufficient¹³ coverage, and must document its coverage. Additional performance and scale test capability is desirable.
- **QU70** The project must including enough documentation for anyone to test or deploy any of the software.
- **QU80** The project must document how it integrates with other OSC Member (or external) projects. Where applicable, the project should be compatible with other active projects.
- **QU90** The project has set up a Continuous Integration pipeline for testing and deployment purposes.
- **QU100** The project must demonstrate sufficient scalability and document its scalability over various dimensions appropriate to the project.

Community

- **CO10** The project has a well-known homepage that points to all the information required to operate according to this maturity model.
- **CO20** The community welcomes contributions from anyone who acts in good faith and in a respectful manner and adds value to the project.
- **CO30** Contributions include not only source code, but also documentation, constructive bug reports, constructive discussions, marketing and generally anything that adds value to the project.
- **CO40** The community is a “holarchy” (see *Governance Principles*) and over time aims to give more rights and responsibilities to contributors who add value to the project.
- **CO50** The way in which contributors can be granted more rights such as commit access or decision power is clearly documented and is the same for all contributors.

⁷ The required level of security depends on the software’s intended uses, of course. Expectations should be clearly documented.

⁸ Apache projects can just point to <http://www.apache.org/security/> or use their own security contacts page, which should also point to that.

¹³ “Sufficient” can mean different things for different projects, the importance here is that the community can be honest and open about the rationale for choosing what to cover and what not to cover, and about what needs test coverage but doesn’t have it.

- **CO60** The community operates based on consensus of its members (see CS10) who have decision power. Dictators, benevolent or not, are not welcome in Apache projects.
- **CO70** The project strives to answer user questions in a timely manner.
- **CO80** The project has an active and diverse set of contributing members representing various constituencies.

Consensus Building

- **CS10** The project maintains a public list of its contributors who have decision power and some sort of documented governance process.
- **CS20** Decisions are made by consensus among PMC members⁹ and are documented on the project’s main communications channel. Community opinions are taken into account but the PMC has the final word if needed.
- **CS30** Documented voting rules are used to build consensus when discussion is not sufficient.¹⁰
- **CS40** In Apache projects, vetoes are only valid for code commits and are justified by a technical explanation, as per the Apache voting rules defined in CS30.
- **CS50** All “important” discussions happen asynchronously in written form on the project’s main communications channel. Offline, face-to-face or private discussions¹¹ that affect the project are also documented on that channel.

Independence

- **IN10** The project is independent from any corporate or organizational influence.¹²
- **IN20** Contributors act as themselves as opposed to representatives of a corporation or organization.
- **IN30** The project is not highly dependent on any single contributor. There are at least 3 legally independent contributors (e.g., code committers), and there is no single organization that is vital to the success of the project.

Impact

- **IM10** The project should be used in real applications and not just in demos. Because not all real-world implementations may be inspected publicly, in such cases statements providing as much details as possible about these implementations should be made.
- **IM20** The project should be able to clearly make the case for its importance in the Development and/or Humanitarian sector(s).

3.11.3 About This Document

The work “DIAL Open Source Center Project Maturity Evaluation” was adapted from “Apache Project Maturity Model” by the Apache Software Foundation, licensed under the Apache License version 2.0.

⁹ In Apache projects, “consensus” means widespread agreement among people who have decision power. It does not necessarily mean “unanimity”.

¹⁰ For Apache projects, <http://www.apache.org/foundation/voting.html> defines the voting rules.

¹¹ OSC projects may have a private mailing list that their governing body is expected to use only when really needed. The private list is typically used for discussions about people, for example to discuss and to vote on PMC candidates privately.

¹² Independence can be understood as basing the project’s decisions on the open discussions that happen on the project’s main communications channel, with no hidden agendas.

3.12 Community-Wide Code of Conduct

3.12.1 Our Pledge

In the interest of fostering an open and welcoming environment, we as contributors and maintainers pledge to making participation in our project and our community a harassment-free experience for everyone, regardless of age, body size, disability, ethnicity, gender identity and expression, level of experience, nationality, personal appearance, race, religion, or sexual identity and orientation.

3.12.2 Our Standards

Examples of behavior that contributes to creating a positive environment include:

- Using welcoming and inclusive language
- Being respectful of differing viewpoints and experiences
- Gracefully accepting constructive criticism
- Focusing on what is best for the community
- Showing empathy towards other community members

Examples of unacceptable behavior by participants include:

- The use of sexualized language or imagery and unwelcome sexual attention or advances
- Trolling, insulting/derogatory comments, and personal or political attacks
- Public or private harassment
- Publishing others' private information, such as a physical or electronic address, without explicit permission
- Other conduct which could reasonably be considered inappropriate in a professional setting

3.12.3 Our Responsibilities

Project maintainers are responsible for clarifying the standards of acceptable behavior and are expected to take appropriate and fair corrective action in response to any instances of unacceptable behavior.

Project maintainers have the right and responsibility to remove, edit, or reject comments, commits, code, wiki edits, issues, and other contributions that are not aligned to this Code of Conduct, or to ban temporarily or permanently any contributor for other behaviors that they deem inappropriate, threatening, offensive, or harmful.

3.12.4 Scope

This Code of Conduct applies both within project spaces and in public spaces when an individual is representing the project or its community. Examples of representing a project or community include using an official project e-mail address, posting via an official social media account, or acting as an appointed representative at an online or offline event. Representation of a project may be further defined and clarified by project maintainers.

3.12.5 Enforcement

Instances of abusive, harassing, or otherwise unacceptable behavior may be reported by contacting the project team at osc@digitalimpactalliance.org. All complaints will be reviewed and investigated and will result in a response that is deemed necessary and appropriate to the circumstances. The project team is obligated to maintain confidentiality with regard to the reporter of an incident. Further details of specific enforcement policies may be posted separately.

Project maintainers who do not follow or enforce the Code of Conduct in good faith may face temporary or permanent repercussions as determined by other members of the project's leadership.

3.12.6 Attribution

This Code of Conduct is adapted from the Contributor Covenant, version 1.4, available [here](#).

3.13 OSC Governance Policy

This policy came into effect in December 2016 and will be reviewed periodically (see revision sections). The last modification has been made in May 2017.

Read more about the specific governance structures within the OSC Community.

3.13.1 Goals

The goals of governance in the Open Source Center (OSC) are to:

- Create a set of minimum requirements for sub-projects hosted within the organization,
- Create a lightweight project lifecycle that:
 - leads each sub-project to articulate its goals and how to achieve them,
 - encourages desired behaviors (e.g., open development),
 - provides motivation for the project to succeed,
 - leads to non-viable projects failing quickly,
 - provides opportunities for other community members, and
 - avoids bureaucracy through lightweight & flexible approaches.
- Encourage in-scope projects related to our mission, values, and vision to be leverage services within the organization rather than going elsewhere, and
- Set clear expectations to vendors, upstream and downstream projects, and participating community members.

3.13.2 Principles

Openness

The Open Source Center is open to all individuals in their individual capacities, and provides the same opportunity to all. Everyone participates with the same rules. There are no rules to exclude prima facie any potential individual contributors, which include individuals associated with direct competitors in the marketplace.

Transparency

All project discussions, minutes, deliberations, project plans, designs, plans for new features, and other artifacts shall be open, public, searchable, and easily accessible to everyone.

Equity of Ideas

The OSC strives toward an equitable community of diverse ideas. Our projects and our leaders are dedicated to creating the best software, and we believe that happens when everyone feels empowered to contribute both their code and their thoughts to our community. Responsibility in the OSC is earned through trust, and increasing trust between all of our community participants is based upon our projects and work being as inclusive as possible.

3.13.3 Member Project & Team Roles

The Open Source Center organizes itself into a number of Member Projects, which follow the Project Governance and Project Lifecycle processes as outlined in this document. SPs are run by individuals and may be referred to as “teams” to highlight the collaborative nature of development. For example, each project has a team page on the OSC web site.

Project/Team Leader

OSC member projects and teams are managed by a project or team leader, who is also a committer of the project/team they lead. The Project Leader is the public figurehead of the project and is responsible for the health of the project. Due to their status in the community, project leads can also act as referees should disagreements amongst committers of the project arise. The project lead typically also has write access to resources, such as the web page of a specific project.

Maintainer

For larger or more complex projects, maintainers may own one or several components within one or more member projects. A maintainer reviews and approves changes that affect their components. It is a maintainer’s prime responsibility to review, comment on, co-ordinate and accept patches from community members, and to maintain the design cohesion of their components. Each member project maintainer shall be listed in a MAINTAINERS file in the root of that project’s code repository or documentation page.

Committers

Committers are Maintainers who are allowed to commit changes into a repository. The committer acts on the wishes of the maintainers and applies changes that have been approved by the respective maintainer(s) to the repository. Due to their status in the community, committers can also act as referees, should disagreements amongst maintainers arise. Committers are listed on the SP’s team web page.

Mentor

Younger member projects may optionally have a desire for a mentor to help ensure that the sub-project will be successful. Mentors can be maintainers, project leaders, advisory board members or other distinguished OSC community members. Mentors are expected to have a monthly review with their mentored projects.

Sponsor

To form a new mentored project or team, the community requires a sponsor to support the creation of the new project. A sponsor can be a project leader or committer of an active project, a member of the Steering Committee, or the director of community. This ensures that a distinguished community member supports the idea behind the project and is responsible to find an appropriate mentor for the project.

3.13.4 Making Contributions

Making contributions to member projects in the Open Source Center follows the conventions as they are known in the Linux Kernel community. In summary, contributions are made through pull requests that are reviewed by the community. **The Open Source Center does not require community members to sign copyright assignments or license agreements.** However, it does require all contributors to provide an assent that they have proper legal authority to license their contributions to the Open Source Center in their individual capacity under a compatible license.

This is not an assignment of copyright; the DCO simply states that the code you submitted is yours to contribute, is unencumbered to the best of your knowledge, and that you are free to submit it without any restrictions beyond the license under which you have submitted the code. Some employers or academic institution claim ownership over code that is written in certain circumstances, so please do due diligence to ensure that you have the right to submit the code. This helps our users ensure the software we license to them is free and clear of any legal encumbrances.

Contribution guidelines for specific sub-projects will be found in those projects' code repositories in the CONTRIBUTING file, or on the Open Source Center web site.

OSC Developer Certificate of Origin 1.0

By making a contribution to this project, I certify that:

1. The contribution was created in whole or in part by me and I have the right to submit it under the open source license indicated in the file; or
2. The contribution is based upon previous work that, to the best of my knowledge, is covered under an appropriate open source license and I have the right under that license to submit that work with modifications, whether created in whole or in part by me, under the same open source license (unless I am permitted to submit under a different license), as indicated in the file; or
3. The contribution was provided directly to me by some other person who certified (a), (b) or (c) and I have not modified it; and
4. In the case of each of (a), (b), or (c), I understand and agree that this project and the contribution are public and that a record of the contribution (including all personal information I submit with it, including my sign-off) is maintained indefinitely and may be redistributed consistent with this project or the open source license indicated in the file.

3.14 Decision Making Process: Recommendations

3.14.1 Consensus Decision Making

Open Source Center projects or teams are self-governing and driven by the people who volunteer for the job. When more formal decision making and coordination is required, decisions are taken with a “lazy consensus” approach: a few positive votes with no negative vote is enough to get going.

Sometimes a member of the community will believe a specific action is the correct one for the community but are not sure enough to proceed with the work under the lazy consensus model. In these circumstances they can state Lazy Consensus is in operation.

What this means is that they make a proposal and state that they will start implementing it in 72 hours unless someone objects. 72 hours is chosen because it accounts for different time zones and outside commitments. If the 72 hours are touching a weekend/holidays it would be wise to extend the timeframe a bit. This will ensure that people can participate in the proposal even when they were offline over the weekend.

Voting is done with numbers:

- +1 : a positive vote
- 0 : abstain, have no opinion
- -1 : a negative vote

A negative vote should include an alternative proposal or a detailed explanation of the reasons for the negative vote. The project community then tries to gather consensus on an alternative proposal that resolves the issue. In the great majority of cases, the concerns leading to the negative vote can be addressed.

3.14.2 Conflict Resolution

Refereeing

Open Source Center (OSC) projects and teams strive for equity of ideas leveraging aspects of both democracy & meritocracy. In situations where there is disagreement on issues related to the day-to-day running of the project, Committers and Project Leads are expected to act as referees and make a decision on behalf of the OSC. Referees should consider whether making a decision may be divisive and damaging for the OSC. In such cases, the committers of the project can privately vote on an issue, giving the decision more weight.

Last Resort

In some rare cases, the lazy consensus approach may lead to the community being paralyzed. Thus, as a last resort when consensus cannot be achieved on a question internal to a project, the final decision will be made by a secret ballot majority vote amongst the committers and project lead. If the vote is tied, the project lead gets an extra vote to break the tie.

For questions that affect several projects, committers and project leads of mature projects will hold a secret ballot majority vote. If the vote is tied, the Technical Steering Committee (TSC) or Governance Advisory Board (GAB) will break the tie through a casting vote.

3.14.3 Elections and Formal Votes

Maintainer Elections

Developers who have earned the trust of maintainers and the project lead can be promoted to Maintainer. A two-stage mechanism is used: Nomination: A maintainer should nominate himself by proposing a patch to the MAINTAINERS file or posting a nomination to the project's category on the Open Source Center forums. Alternatively, another maintainer may nominate a community member. A nomination should explain the contributions of proposed maintainer to the project as well as a scope (set of owned components). Where the case is not obvious, evidence such as specific patches and other evidence supporting the nomination should be cited. Confirmation: Normally, there is no need for a direct election to confirm a new maintainer. Discussion should happen in the forums using the principles of consensus

decision making. If there is disagreement or doubt, the project lead or a committer should ask the Director of Community to arrange a more formal vote. Committer Elections Developers who have earned the trust of committers in their sub-project can through election be promoted to Committer. A two-stage mechanism is used:

1. **Nomination:** Community members should nominate candidates by posting a proposal by sending a direct message to the appropriate category on the Open Source Center (OSC) forums, explaining the candidate's contributions to the sub-project and thus why they should be elected to become a Committer of that sub-project. The nomination should cite evidence such as patches and other contributions where the case is not obvious. Existing Committers will review all proposals, check whether the nominee would be willing to accept the nomination and publish suitable nominations in the OSC forums publicly for wider community input.
2. **Election:** A committer will be elected using the decision making process outlined earlier. Voting will be done by committers for that project privately using a voting form that is created by the community manager. Should there be a negative vote the Project Leader and Director of Community will try and resolve the situation and reach consensus. Results will be published in the public forums.

Project Leader Elections

Projects which lose their project leader are at risk of failing. Should this occur, the project's maintainer community should agree on a suitable new project leader and follow the same election process as outlined above.

Formal Votes

Sometimes it is necessary to conduct formal voting within the Open Source Center (outside of elections). Formal votes are necessary when processes and procedures are introduced or changed, or as part of the Project Governance. Who is eligible to vote, depends on whether the scope of a process or procedure is local to a project or team, or whether it affects all projects (global). An example of local scope is a code review policy which applies to one specific sub-project only. Examples of global scope are changes to this governance document, or votes outlined in the OSC Governance document.

- **Scope: Local**
 - **Who reviews:** Readers of the affected projects' categories on the OSC forums.
 - **Who votes:** Maintainers of the project(s), which are affected by the process, procedure, etc. are allowed to vote. This includes maintainers from incubation projects (if the scope affects the project).
- **Scope: Global**
 - **Who reviews:** Readers of all OSC forums project categories.
 - **Who votes:** Maintainers of all active projects and the OSC Director of Community are allowed to vote.

The Director of Community first arranges a public review, followed by a timed private vote. Public review and voting should be open for a minimum of one week each. For voting a traceable poll mechanism, e.g., a voting system that keeps auditable and tamper proof records, must be used. Voting follows the conventions as laid out in "Principle: Consensus Decision Making".

3.15 Contribution Policy

You and other contributors are part of the growing Open Source Center (OSC). We work together to share ideas, software, documentation, bug fixes, development tools, project management resources, and anything else of value that you contribute to create useful software. Our success is solely credited to our contributors, working together as a community.

Our Contribution Policy is simple: Voluntary contributions are gratefully accepted as long as the OSC and all downstream users are allowed to use those contributions for our mission to benefit the public.

There are many kinds of contributions we invite you to make for this cause:

- Tangible contributions of intellectual property such as source code and documentation, ideas and inventions, and other technical solutions to problems
- In-kind and financial donations to support our activities
- Contributions of your time and your efforts to communicate and cooperate with each other in the Open Source Center.

The OSC accepts intellectual property contributions of many kinds and then collects them into software distributions that are licensed to the public under the open source Mozilla Public License 2.0. Non-code contributions such as documentation, images, or other creative works are made available under the Creative Commons Attribution 4.0 International

License. (TODO: Update based on OSC License Policy.)

The details around intellectual property contributions in particular are often tricky to understand. As described more fully below, OSC project teams review all software contributions to ensure that open source licenses for the contributions are compatible with the MPL 2.0 license.

If you have questions about any aspect of the OSC Contribution Policy, please contact osc@digitalimpactalliance.org.

3.15.1 Contributions of Intellectual Property

Software includes both functional and expressive works, and it sometimes arrives encumbered with many varieties of legal interests that can be owned, licensed, monopolized or sold, or limited for its use in derivative or advanced software. The OSC collects such contributed software into larger packages that we distribute as collective works under the MPL 2.0 license. To do so, we must ensure that the open source licenses applying to those contributions are compatible with MPL 2.0, and that there are no intellectual property encumbrances that would prevent the use of our collective software distribution worldwide.

As is described in the OSC Copyright and DMCA Policy, we respect all copyrights and copyright licenses.

To ensure licensing consistency, we take steps to determine that contributions of intellectual property are not encumbered. These are the steps:

1. We accept contributions only from people who identify themselves as an individual with a public account on OSC websites. Each person's profile, and all other materials he or she posts on OSC websites, is available to the public. See the OSC Privacy Policy for more information.
2. All contributions are required to be the contributor's own work licensed to the OSC under an approved open source license, or a work that is licensed to that contributor for redistribution to the OSC under an approved open source license. OSC project teams have responsibility for knowing their contributors and those contributions, as would be expected of any professional software project. Random contributions from unknown project participants without information suitable for NOTICE file are likely not to be accepted by an OSC project.
3. OSC projects may accept ideas, suggestions, bug fixes, and other similar contributions from the public. Our standards and rules of behavior in such situations say that we should identify and acknowledge those informal and formal contributions. A NOTICE file included with each software release by the OSC will identify the provenance of all contributions, to the best of the contributors' and the project team's current knowledge and belief. Each contributor is responsible for providing enough information so that the appropriate OSC project team can prepare a correct NOTICE file.

3.15.2 Contents of the NOTICE File

The NOTICE file that accompanies every formal distribution of software by a OSC project identifies each third-party component in that software and the open source or Creative Commons license under which that component is available to the public. The following information, if available, will also be included in the NOTICE file:

- Copyright notices supplied by the licensor(s) of any part of the software. OSC project teams may elect to remove individual copyright notices that detract from the “community” ethos of the project, but individual copyrights will still be protected by a legally-effective and encompassing copyright notice such as “Copyright (C) 2017 United Nations Foundation, Inc.”
- Patent notices identifying specific patents or patent claims that may read on the software. Contributors and all project team members are expected to disclose any patent claims of which they are aware. In the event that possible patent claims may be confidential, the contributor must disclose enough about them to alert the public about possible future encumbrances.
- Identification of industry standards implemented by the software.
- OSC projects and contributors may also include acknowledgement and attribution to individuals, companies or other organizations for significant portions of the software or its documentation, or who contributed in other ways to the project as a whole.
- Other important notices that the OSC project team or its contributors want to share with the downstream users of that software.

3.15.3 Approved Open Source Licenses for OSC Contributions

The OSC relies on the recommendations of Open Source Initiative, the Free Software Foundation, and Creative Commons to determine which free and open source licenses are compatible with the Mozilla Public License 2.0 under which the OSC distributes software and documentation.

Additional content will be developed in the coming months to provide further guidance on acceptable, preferred, and discouraged open source licenses for the community.

Some of those licenses may not be compatible with the license requirements of some commercial companies. That is another purpose for the NOTICE file that OSC projects provide with each software distribution. Each downstream modifier and/or distributor of OSC software and documentation is responsible for making such license compatibility determinations for itself.

Rest assured that OSC software and documentation can be used for free by everyone in the world under the open source MPL 2.0 license.

3.16 Copyright & DMCA Policy

All software on any Open Source Center (OSC) website or code repository is distributed to the public by United Nations Foundation, Inc. under the Mozilla Public License 2.0. All other content such as documentation or other creative works is distributed under the Creative Commons Attribution 4.0 International License.

United Nations Foundation, Inc. and the Open Source Center respect all copyrights and copyright licenses. If you see any infringing content on a Open Source Center website, email list or any other resource, please refer to the DMCA instructions at the end of this page.

3.16.1 Software and Documentation Licenses

Individual components of Open Source Center-released software and documentation may also be available to the public under the open licenses chosen by their copyright holders.

We disclose information about those components and their licenses in the NOTICE file that accompanies our software.

See the Open Source Center Contribution Policy for more information about the contents of the NOTICE file.

3.16.2 Website Content Copyrights

Any and all original material that is posted by any member of the public or by a registered Open Source Center contributor to any Center-operated website shall be publicly available under the Creative Commons Attribution 4.0 International License, unless otherwise noted. Certain material that is not original to the Open Source Center (which will be specifically noted as such) may require permission from the copyright holder to redistribute.

You do NOT have to ask permission to post your own material on the Open Source Center forum. Refer to the Open Source Center Privacy Policy for additional information about such postings.

You do NOT have to ask permission to reprint an Open Source Center statement from our website in an article. Permission to do this is explicitly granted. Note also that the open source and Creative Commons licenses used for copyrighted materials on Open Source Center websites all allow such fair uses.

If you redistribute something you retrieved from a Open Source Center website, please inform recipients where that copyrighted work originated, so people can get more information or updated versions directly at the Open Source Center website.

3.16.3 OSC Trademarks

Open Source Center trademarks and logos may only be used in their unmodified forms. They are not licensed under an open source license. You do NOT have to ask permission to use the official Open Source Center logo as a hyperlink to a Open Source Center website from your own website.

Refer to the Open Source Center Trademark Policy for additional information.

3.16.4 DMCA Notices and Copyright Infringement Notification

If you believe there is content on an Open Source Center website that violates copyright law, let us know. The notice should be sent to our designated agent, Michael Downey via email (osc@digitalimpactalliance.org).

Specifically, send us an email or letter that includes substantially the following:

1. A physical or electronic signature of a person authorized to act on behalf of the owner of an exclusive right that is allegedly infringed.
2. Identification of the copyrighted work claimed to have been infringed, or, if multiple copyrighted works at a single online site are covered by a single notification, a representative list of such works at that site.
3. Identification of the material that is claimed to be infringing or to be the subject of infringing activity and that is to be removed or access to which is to be disabled, and information reasonably sufficient to permit the service provider to locate the material.
4. Information reasonably sufficient to permit the service provider to contact the complaining party, such as an address, telephone number, and, if available, an electronic mail address at which the complaining party may be contacted.

5. A statement that the complaining party has a good faith belief that use of the material in the manner complained of is not authorized by the copyright owner, its agent, or the law.
6. A statement that the information in the notification is accurate, and under penalty of perjury, that the complaining party is authorized to act on behalf of the owner of an exclusive right that is allegedly infringed.

We may display a copy of your DMCA notice in place of the removed content.

Note: Under Section 512(f) of the DMCA, any person who knowingly materially misrepresents that material or activity is infringing may be subject to liability for damages. In addition, “in order for a copyright owner to proceed under the DMCA with “a good faith belief that use of the material in the manner complained of is not authorized by the copyright owner, its agent, or the law,” the owner must evaluate whether the material makes fair use of the copyright.” Lenz v. Universal, 572 F. Supp. 2d 1150, 1155 (2008)

The Open Source Center reserves the right to review the allegedly infringing material and independently determine whether it is infringing.

Please also note that the information provided in this legal notice will be forwarded to the person who provided the allegedly infringing content. A copy of this legal notice may also be sent (with your personal information removed) to a third-party that may publish and/or annotate it for noncommercial research and educational purposes.

3.16.5 Counter-Notification: What You Can Do If Your Content Was Removed

If you believe material you posted to a Open Source Center website was not infringing, you can submit a counter-notice. If you need assistance in determining whether the material was not infringing, please find an independent attorney to evaluate your situation.

A counter-notification must include the following:

1. Identification of the specific URLs of material that the Open Source Center has removed or to which the Open Source Center has disabled access.
2. Your full name, address, telephone number, and email address.
3. The statement: “I consent to the jurisdiction of the Federal District Court for the district in which my address is located, or if my address is outside of the United States, the judicial district in which the Open Source Center intellectual property owner is located, and will accept service of process from the claimant.” The current intellectual property owner for the Open Source Center is United Nations Foundation, Inc., which is incorporated in the Southern District of New York.
4. The statement: “I swear, under penalty of perjury, that I have a good faith belief that the material was removed or disabled as a result of a mistake or misidentification of the material to be removed or disabled.”

A scanned physical signature or a valid electronic signature is fine.

Please send your counter-notice to Michael Downey via email (osc@digitalimpactalliance.org).

Please note that under Section 512(f) of the Copyright Act, any person who knowingly materially misrepresents that material or activity was removed or disabled by mistake or misidentification may be subject to liability. After we receive your counter-notification, we will forward it to the party who submitted the original claim of copyright infringement. Please note that when we forward the counter-notification, it includes your personal information. If you are concerned about protecting your anonymity, please consult with an attorney about other options.

After we send out the counter-notification, the claimant must then notify us within 10 business days that the claimant has filed an action seeking a court order to restrain you from engaging in infringing activity relating to the material on the Open Source Center website(s). If we receive such notification we will be unable to restore the material. If we do not receive such notification, generally we will reinstate the material.

Please also be advised that in appropriate circumstances we will deny access to the Open Source Center websites by repeat infringers.

3.17 Privacy Policy

The Open Source Center is a free & open source service project organized by a worldwide group of volunteers. Our challenges and goals are large. For that reason, we have a very permissive (non) privacy policy that mirrors our public mission.

Please assume that everything you contribute intentionally to the Open Source Center is public. This includes messages on public forums, wikis, online discussions of all sorts, and software or documentation that you post to our websites.

Because we value mutual personal respect, disclosure of interests, and openness of expression, even your Open Source Center profile is public information. There will be cases where you are invited to share private information for various purposes, and denote that information as such. In those cases, we commit to only disclosing that information without your permission upon receipt of valid legal orders, and whenever possible, following notice from the Open Source Center to you.

Although what you disclose here is public, we are all limited by copyright and patent law in how we may use your contributions. Therefore, the Open Source Center only accepts voluntary contributions of software and documentation that are expressly licensed to the Open Source Center under an approved open source license. Refer to the Open Source Center Contribution Policy for additional details.

The Open Source Center welcomes your questions or comments regarding this Privacy Policy. Send them to osc@digitalimpactalliance.org.

3.18 Community & Project Trademark Policy

Open source software from the Open Source Center (OSC) is free to copy, to modify and to distribute. Unless otherwise indicated, it is licensed under the Mozilla Public License 2.0.

Meanwhile, the trademarks for this software – including the “Open Source Center” wordmark as well as the graphic logo – are kept as private property. Trademarks are different than copyrights, particularly in an open source community such as the Open Source Center. Trademarks can only be copied for certain specific purposes (“nominative fair use”) and cannot be modified in a way to confuse consumers about the origin of the FOSS software (“confusing similarity”). These trademark law terms are described more completely below.

Examples of FOSS trademarks: Linux, Eclipse, Apache, JBoss, MySQL, Firefox, Mozilla, Jaspersoft, Hadoop, Java, OpenOffice, etc.

“Open Source Center” is like those trademarks. It is a visible brand associated with high-quality open source software. It is a brand created by our worldwide community. Our brand represents our collective pride and our reputation. We do not want anyone to misuse or misappropriate our brand. We want the value of our trademarks to accrue to the Open Source Center and its participants as a whole.

United Nations Foundation, Inc. is a non-profit corporation that owns and manages all Open Source Center-related trademarks, service marks, and graphic logos in service of our volunteer community. As a US-based corporation, we have a legal responsibility and authority to set guidelines for the use of our marks. This Trademark Policy outlines how we use our trademarks and logos to identify software developed and distributed by the Open Source Center.

The following information helps ensure our marks and logos are used in approved ways, while making it easy for the community we serve to understand the guidelines. If you have any questions about the use of logos or trademarks that are not addressed in these guidelines, feel free to contact us at osc@digitalimpactalliance.org.

3.18.1 Rationale for the Open Source Center Trademark Policy

Open Source Center trademarks, service marks, and graphic marks are symbols of the quality and community support that people have come to associate with projects of the Open Source Center. To ensure that the use of Open Source

Center marks will not lead to confusion about our software, we must control their use in association with software and related services by others. The Open Source Center and its software must be clearly distinguishable from any software from third parties, and from software or services by any company or individual that is not specifically authorized and approved by the Open Source Center. We must also prevent Open Source Center marks from being used to disparage Open Source Center software, our projects, members, sponsors, or communities, and prevent their use in any way to imply ownership, endorsement, or sponsorship of any Open Source Center-related project or initiative of any kind.

3.18.2 Key Trademark Principles

This document is not intended to summarize the complex law of trademarks. It will be useful, however, to understand the following key principles:

What is a trademark?

A trademark is a word, phrase, symbol or design, or a combination of words, phrases, symbols or designs, that identifies and distinguishes the source of the goods of one party from those of others. A service mark is the same as a trademark, except that it identifies and distinguishes the source of a service rather than a product. Throughout this policy document, the terms “trademark” and “mark” refer to both trademarks and service marks.

These rules are generalized in this document to describe Open Source Center software associated with the trademark “OSC Foo™”, or more briefly “Foo™” when it is understood to refer to this specific OSC Foo software. Like all Open Source Center software, this Foo software is maintained by a Open Source Center member project.

Open Source Center trademarks are either words (e.g., “OSC” and “OSC Foo” and “Foo”) or graphic logos that are intended to serve as trademarks for that Open Source Center software. The Open Source Center graphic logo is described in the Open Source Center Logo Policy, has special meaning for the Open Source Center: We intend that graphic logo to be used for linking third party websites to Open Source Center websites.

Within Open Source Center sub-projects, during our product release activity and on Open Source Center websites, we will make sure that our trademarks are marked with a (TM) or (R) symbol or shown with trademark notices where appropriate so that everyone will recognize them as Open Source Center trademarks. A current list of Open Source Center trademarks is available at our web site.

What is nominative use?

Anyone can use Open Source Center trademarks if that use of the trademark is nominative. The “nominative use” (or “nominative fair use”) defense to trademark infringement is a legal doctrine that authorizes everyone (even commercial companies) to use another person’s trademark as long as three requirements are met:

1. The product or service in question must be one not readily identifiable without use of the trademark (for example, it is not easy to identify Apple iPhone software without using the trademark “iPhone”); and
2. Only so much of the mark or marks may be used as is reasonably necessary to identify the product or service; and
3. The organization using the mark must do nothing that would, in conjunction with the mark, suggest sponsorship or endorsement by the trademark holder.

The trademark nominative fair use defense is intended to encourage people to refer to trademarked goods and services by using the trademark itself. This trademark defense has nothing to do with copyright fair use and should not be confused with those rules.

What is the “confusing similarity” or “likelihood of confusion” test?

Some uses of another person’s trademark are nominative fair use, but some uses are simply infringing. Indeed, if a trademark is used in such a way that the relevant consuming public will likely be confused or mistaken about the source of a product or service sold or provided using the mark in question, then likelihood of confusion exists and the mark has been infringed.

Note that, even if there is no likelihood of confusion, you may still be liable for using another company’s trademark if you are blurring or tarnishing their mark under United States federal and/or state dilution laws, or other laws around the world.

To avoid infringing Open Source Center marks, you should verify that your use of our marks is nominative and that you are not likely to confuse software consumers that your software is the same as Open Source Center software or is endorsed by the Open Source Center. This policy is already summarized in section 2.3 of the Mozilla Public License (MPL) 2.0, and so it is a condition for your use of Open Source Center software and associated documentation:

This License does not grant any rights in the trademarks, service marks, or logos of any Contributor (except as may be necessary to comply with the notice requirements in Section 3.4).

3.18.3 Specific Guidelines

The following Specific Guidelines apply to the “Open Source Center” word trademark and the Open Source Center graphic logo, as well as the trademarks and graphic logos for typical “OSC Foo” and “Foo” software produced by Open Source Center sub-projects. You may refer to our list of current Open Source Center marks at our web site.

Examples of permitted nominative fair use:

- “Free copies of Open Source Center software under the MPL 2.0 license and support services for OSC Foo are available at my own company website.”
- “Derivative works of OSC Foo software and support services for those derivative works are available under my own trademarks - at my website.” Please remember that, under trademark law, you may not apply trademarks to your derivative works of Open Source Center software that are confusingly similar to a product name such as “OSC Foo”, or any of our graphic logos.
- “Foo software is faster (or slower) than Myco software.”
- “I recommend (or don’t recommend) Foo software for your business.”
- “This is the graphic logo for OSC Foo software: “
- Using Open Source Center trademarks in book and article titles

You may write about Open Source Center software, and use our trademarks in book or article titles. You needn’t ask us for permission to refer to Foo, as in “Foo for Dummies”, or “Explaining Foo”, or “Foo Simplified”, or even “Avoiding Foo”.

We prefer that you refer to “OSC Foo” rather than simply “Foo” in the title if it fits, and we request that you clearly identify that “Open Source Center”, “OSC Foo”, and “Foo” are trademarks of United Nations Foundation, Inc. whenever you normally acknowledge important trademarks in your book or article.

Using Open Source Center graphic logos

Graphic logos are contributed to the Open Source Center by artists as a way of creating a symbol with which Open Source Center software can be identified. Those graphic logos are special to the Open Source Center sub-projects that mark their software with those logos. The Open Source Center graphic logo is a special trademark to the Open Source Center and we intend to prevent its use in association with other companies’ software or related services.

It is not necessary to ask us for permission to use Open Source Center graphic logos (the versions published on Open Source Center websites) on your own website solely as a hyperlink to Open Source Center websites, or in other materials, such as presentations and slides, solely as a means to refer to the Open Source Center itself.

All other uses of the Open Source Center graphic logo must be approved in writing by United Nations Foundation, Inc.

If you have any questions or concerns about the use of or changes to any Open Source Center graphic trademark, email us at osc@digitalimpactalliance.org. Using Open Source Center trademarks on merchandise We will typically grant written permission to apply Open Source Center trademarks (including graphic logos) for merchandise that promotes the Open Source Center, its software, community, or its worldwide mission.

Permission to apply Open Source Center trademarks will ordinarily be denied for merchandise that disparages Open Source Center software or projects or that would serve to detract from the value of the Open Source Center, its software, community, or its brands.

Using Open Source Center trademarks in domain names

You may not use Open Source Center trademarks such as “Open Source Center” or “OSC Foo” or “Foo” in your own domain names if that use would be likely to confuse a relevant consumer about the source of software or services provided through your website. You should apply the “likelihood of confusion” test described above, and please realize that the use of Open Source Center trademarks in your domain names is generally not “nominative fair use.”

Using Open Source Center trademarks in relation to conferences and events

Certain Open Source Center trademarks may be reserved exclusively for official Open Source Center activities. For example, “Open Source Center Summit” may be used as our exclusive trademark for our regular Open Source Center conferences, and the Open Source Center graphic icon is intended for Open Source Center use at events in which we participate.

Individual Open Source Center sub-projects (such as “OSC Foo”) may create their own conferences and events, or join with other organizations or companies to hold joint conferences or events.

The following uses of Open Source Center trademarks are probably infringing:

- Confusingly similar software product names.
- Software service offerings that are for anything other than official Open Source Center-distributed software.
- Company names that may be associated in customer’s minds with the Open Source Center or its trademarked project software.

3.18.4 Important Notes

Nothing in this Open Source Center Trademark Policy shall be interpreted to allow any third party to claim any association with the Open Source Center, United Nations Foundation, Inc., or any of its projects or to imply any approval or support by United Nations Foundation, Inc. for any third party products or services.

Open Source Center and the Open Source Center graphic logo is a trademark owned by United Nations Foundation, Inc.