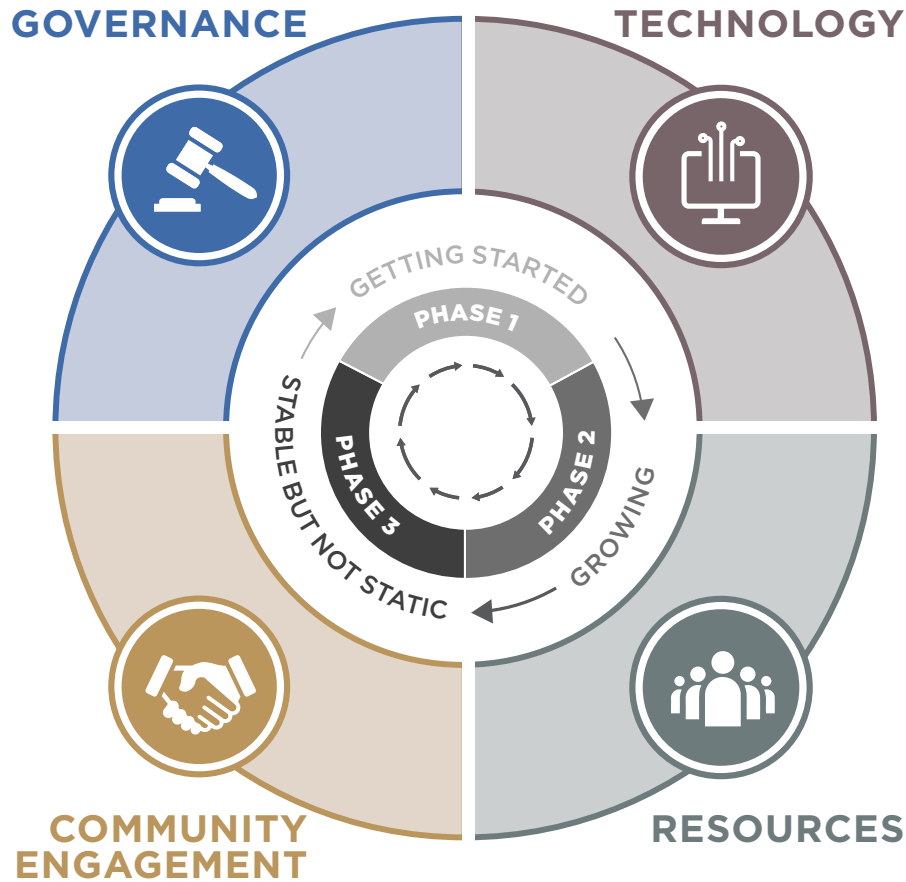


Sustainability Wheel



 **GOVERNANCE**

Phase I: Establishing
Working with original engineers, project staff, or organization. [Go to page 11.](#)

Phase II: Stabilizing
Functional but limited in one or more aspects. [Go to page 12.](#)

Phase III: Evolving
Strong management structures; not necessarily formal governance. [Go to page 13.](#)

 **TECHNOLOGY**

Phase I: Laying the Groundwork
In design, pre-release or early beta testing phase; small set of early adopters. [Go to page 20.](#)

Phase II: Expanding and Integrating
Have more than one public release. [Go to page 21.](#)

Phase III: Preparing for Change
In production, well-adopted, supported. Technology stack stable. May be looking to next generation. [Go to page 22.](#)

 **RESOURCES**

Phase I: Creating Consistency
Funded by single organization, grant-funded or volunteer operated. [Go to page 26.](#)

Phase II: Diversification
Distributed resourcing; meeting expenses, small number of revenue streams. [Go to page 27.](#)

Phase III: Stable, but not Static
Diverse staff support and income streams; focused on long-range strategy. [Go to page 28.](#)

 **COMMUNITY ENGAGEMENT**

Phase I: Getting Beyond Initial Stakeholders
Focused on primary stakeholders; lack of engagement with broader communities. [Go to page 32.](#)

Phase II: Establishing CE Infrastructure
Determining how to facilitate engagement that works for community. [Go to page 33.](#)

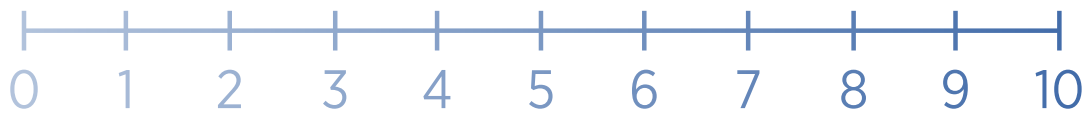
Phase III: Evolving CE
Established infrastructure to enable engagement. [Go to page 35.](#)

Appendix A: Sustainability Worksheet

For each facet, give your program a score from 1-10 based on your knowledge of the program’s strengths and weaknesses in that area. Scores between 0-3 will align most closely with Phase I, between 4-7 with Phase II, and 8-10 with Phase III.

Facet: Governance

“A governance model describes the roles that project participants can take on and the process for decision making within the project. In addition, it describes the ground rules for participation in the project and the processes for communicating and sharing within the project team and community.”³



Facet: Technology

The core of each of these programs is an open source software application serving cultural heritage organizations. There are parallels with proprietary software development processes, but working within the open source world brings its own challenges around community, resources, and governance that affect the software development process.



Facet: Resources

In order to launch, grow, and thrive, OSS programs need resources both human and fiscal. Human resources encompass engineers writing code, community members providing use cases, or organizational homes with fiscal stewardship. Financial resources come in and go out in a wide variety of ways - in via contributions, grants, dues, sponsorships, etc., and out via salaries, servers, overhead, etc.



Facet: Community Engagement

The Community Engagement facet reflects efforts to facilitate and foster engagement within a community. It is focused on encouraging users to become stakeholders. A component of this facet also includes communication and outreach efforts to the community itself as well as the wider world of decision makers, potential users, funding agencies and others.



³ Gardler, Ross and Gabriel Hanganu. “Governance Models.” OSS Watch. <http://oss-watch.ac.uk/resources/governancemodels> (accessed November 30, 2017).