Activity: Diversifying Revenue Streams

Goals

1. Identify strengths and weaknesses of your program's current revenue-generating activities

2. Identify revenue-generating activities to improve or discontinue

Prerequisites

None

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers)

Length

90 minutes

Activity Instructions

1. As a group, complete a "SWOT" analysis for each of your program's current revenue streams. Examples of revenue streams include paid memberships, grants, professional services, and hosting. Template included below (page 2).

   o Strengths: The aspects that are working well in a project or situation and which people are proud to talk about.

   o Weaknesses: The aspects that do not work so well.

   o Opportunities: Ideas on how to overcome weaknesses and build on strengths.

   o Threats: The elements that constrain or threaten the range of opportunities for change.

2. Based on the results of the analysis, decide as a group whether you would like to continue on as currently implemented, continue with changes, or explore discontinuing.

   o The Gradients of Agreement chart below (page 3) may help your group achieve consensus. Instructions for the Gradients of Agreement are provided with the chart below.

   o Example proposals for this activity might be: "Program should discontinue membership" or "Program should continue with the registered service provider program but make changes to the fee structure."

3. Move to the next step based on your decisions:

   a. If the decision was made to keep all revenue streams as is, summarize and document the conversation and close the activity.

   b. If the decision was made to continue a revenue stream with adjustments, move to Activity: Adjusting Existing Revenue Streams.

   c. If the decision was made to explore discontinuing a revenue stream, move to Activity: Discontinuing Existing Revenue Streams.

   d. If members of the program team would like to explore entirely new revenue streams, move to Activity: Understanding Financial Resource Models.

Activity: Diversifying Revenue Streams

Strength	Weakness
Opportunity	**Threat**

Activity: Diversifying Revenue Streams

GRADIENTS OF AGREEMENT

1	Endorsement	
2	Endorsement with minor point of contention	
3	Agreement with reservations	
4	Abstain	
5	Stand aside	
6	Formal disagreement, willing to go with majority	
7	Formal disagreement, desolved of responsibility	
8	Block/veto	

Tally votes
in each box

To use the Gradients of Agreement chart:

- Record the proposal being used (e.g. on a flipchart or virtual whiteboard/document)
- Confirm that everyone understands the proposal, and make any necessary changes
- Read through the gradient definitions, from Endorsement to Veto
- Poll the participants to see where everyone stands. Note that the results show the level of support for a proposal, final decisions will take the results into account but are not based solely on the poll

Activity: Adjusting Existing Revenue Streams

Activity Instructions

1. For each revenue stream identified in Activity: Diversifying Revenue Streams to explore improving, transfer the results of the SWOT Analysis to the below "TOWS" template. A TOWS chart helps make connections among the quadrants of your SWOT, moving from information gathering to creating strategies for action.

2. As a group, discuss each new element of the analysis and try to identify one to two strategies per box to explore further. The strategies you identify might include entirely new activities, ways to improve efficiency of existing activities, ways to repurpose existing resources to be more effective, etc.

   a. What are our strengths? What are our opportunities? How can we apply our strengths to make use of available opportunities?

   b. What are our strengths? What are the major threats we identified? How can we use our strengths to avert threats?

   c. What are our weaknesses? What are our opportunities? How can we minimize our weaknesses by taking advantage of our opportunities?

   d. What are our weaknesses? What are our threats? How can we minimize weaknesses to avoid threats?

3. Determine as a group which strategies to move forward with. Depending on the nature of the strategy, you may need to:

   a. Write a proposal for the change including the results of this activity and Diversifying Revenue Streams and present to members of leadership for approval.

   b. Complete a market scan to gather data about how the strategy will be received; for example, if you would like to parlay your strength in one market to another related market. If you (or your home org) do not have a standard market scan workflow, the Library of Congress's Small Business Hub (US) has an excellent resource guide.

   c. Complete a pilot proposal to lay out how you will test the efficacy of the new strategy. If you (or your home organization) do not have a standard piloting process or workflow, you can use the **Activity: Pilot Project Plan Template**.
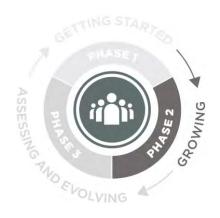
Activity: Adjusting Existing Revenue Streams

TOWS Template

	Opportunities (external, positive)	Threats (external, negative)
Strengths (internal, positive)		
Weaknesses (internal, negative)		

Activity: Discontinuing Existing Revenue Streams

Goals

1. Identify revenue-generating activities that can be discontinued
2. Develop a plan for gaining approval from governance / leadership

Prerequisites

Resources Activity: Diversifying Revenue Streams

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers)

Length

90 minutes

Activity Instructions

1. Choose one revenue-generating activity identified in **Activity: Diversifying Revenue Streams** to explore discontinuing.

2. Review the results of the SWOT Analysis and answer the following questions:

   a. How much revenue is the activity generating for the program annually? What percentage is this of our overall revenue?

   b. What revenue goals was the activity supporting? What alternatives are there to support our revenue goals?

   c. What human, financial, and/or technical resources does this activity require? Is it proportionate to the revenue?

   d. Does this activity add to or distract from our program mission?

   e. Does this activity have any strengths (internal positives)? If we discontinue it, can we apply those strengths to other revenue streams?

   f. What are the core weaknesses of the activity (internal negatives)? Is there a way to counteract or use opportunities to minimize our weaknesses?

   g. Are there opportunities around this activity? Does it make sense to explore them, or do other ideas have more potential?

   h. What are the threats (external negatives) to this activity? Do these threats apply to other revenue streams? Does minimizing the weaknesses of this activity have any effect on the threat level?

3. Based on the results of the above analysis, discuss and make a recommendation to discontinue / do not discontinue / evolve the activity.

   a. The Gradients of Agreement chart below (page 3) may help your group achieve consensus. Instructions for the Gradients of Agreement are provided with the chart below.

   b. Example Gradients of Agreement proposals for this activity might be: "Program should discontinue membership" or "Program should evolve hosting."

Activity: Discontinuing Existing Revenue Streams

4. If, after the above elements are complete, the decision is made to discontinue a revenue-generating activity, move on to:

    a. Gain approvals from the appropriate governance / leadership representatives.

    b. If necessary, develop a discontinuation communication plan.

        i. See **Activity: Developing an End-of-Life Communications Plan** for help.

    c. Communicate changes to stakeholders

        i. Internal - ensure all program team members are aware of the change and the key details - why, when, alternatives. Update documentation (website, etc.) to ensure that the activity is no longer being advertised or promoted.

        ii. External - if necessary, reach out to affected users with a simple, concise message - enough detail so that nothing is unclear, date the activity will be discontinued, and recommendations for alternatives. Be sure to reach out via different channels and monitor feedback.
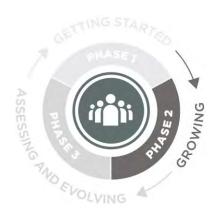
Activity: Discontinuing Existing Revenue Streams

GRADIENTS OF AGREEMENT

1	Endorsement	
2	Endorsement with minor point of contention	
3	Agreement with reservations	
4	Abstain	
5	Stand aside	
6	Formal disagreement, willing to go with majority	
7	Formal disagreement, desolved of responsibility	
8	Block/veto	

Tally votes
in each box

To use the Gradients of Agreement chart:

1. Record the proposal being used (e.g. on a flipchart or virtual whiteboard/document)
2. Confirm that everyone understands the proposal, and make any necessary changes
3. Read through the gradient definitions, from Endorsement to Veto
4. Poll the participants to see where everyone stands. Note that the results show the level of support for a proposal, final decisions will take the results into account but are not based solely on the poll

Activity: Expanding Your Contributor Community

Goals

1. Understand the range of various contribution methods and support systems and how they function

2. Understand what adopting different contribution methods or support systems could mean for your own program

3. Identify one or two new contribution methods or support systems for your program to pilot

Prerequisites

None

Who Should Participate?

Program leadership (strategic thinkers), Program management (tactical thinkers)

Length

X minutes

Activity Instructions

1. Start with 5-10 minutes of silent reflection to read through the list of typical community contribution methods below and choose 3-5 that your program is not currently doing, and that you think have the most potential to expand your contributor community. Feel free to add new items to the list, and/or cross off those items that your program is already doing.

2. On a physical or virtual whiteboard, hold a sticker vote to identify those community contribution methods the group would like to discuss further.

   o In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

3. Take the top three-five vote getters and discuss the benefits and limitations of each, and how they may or may not work for your program. Suggested discussion prompts:

   a. What options hold the highest likelihood of success?

   b. What would we enjoy doing?

   c. How would any of these methods change what we do?

   d. What is most in keeping with our mission?

   e. Who will be responsible for managing the work this method requires? Will it change their roles and responsibilities?

4. What direct and indirect costs would be required to support this method (e.g., direct payments, staff time, hardware purchases, etc.). Do the potential benefits outweigh the costs?

5. As a group, determine the top two new contribution types from your list that you would like to consider for your program.

   o The Gradients of Agreement chart below may help identify which methods are on and/or off the table. Instructions for the Gradients of Agreement are provided with the chart.

Activity: Expanding Your Contributor Community

6. Move to your program or home organization's piloting process or workflow. If you do not have a standard piloting process or workflow, you can use the Activity: Pilot Project Plan Template.

Community Contribution Types

Source: https://chaoss.community/metric-types-of-contributions/

- Bug Triaging
- Community Building and Management
- Documentation Authorship
- Event Organization
- Financial Management
- Legal Counsel
- Localization/L10N and Translation
- Marketing and Campaign Advocacy
- Public Relations - Interviews with Technical Press
- Quality Assurance and Testing
- Reviewing Code
- Security-Related Activities
- Social Media Management
- Speaking at Events
- Teaching and Tutorial Building
- Troubleshooting and Support
- User Interface, User Experience, and Accessibility
- User Support and Answering Questions
- Website Development
- Writing Articles
- Writing Code

Activity: Expanding Your Contributor Community

GRADIENTS OF AGREEMENT

1	**Endorsement**	
2	**Endorsement with minor point of contention**	
3	**Agreement with reservations**	
4	**Abstain**	
5	**Stand aside**	
6	**Formal disagreement, willing to go with majority**	
7	**Formal disagreement, desolved of responsibility**	
8	**Block/veto**	

Tally votes
in each box

To use the Gradients of Agreement chart:

1. Record the proposal being used (e.g. on a flipchart or virtual whiteboard/document)
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Activity: Vendor / Service Provider Landscape Analysis

Goals

1. Identify the vendor/service provider ecosystem in your domain

2. Use results to identify opportunities for collaboration or partnerships

Prerequisites

None, although this activity assumes that your program has already decided to explore working with outside vendors / service providers, i.e., the activity is about *how* to identify potential vendor partners, not *whether* to engage.

Who Should Participate?

Program management (tactical) with initial brainstorming input from program leadership and program staff.
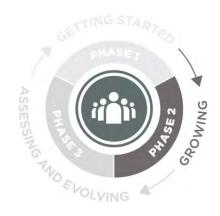
Length

90-120 minutes pre-work; 90 minutes together

Activity Instructions: Pre-Work

1. Build as comprehensive a list as possible of the vendor/service provider landscape in your domain: for-profit or non-profit organizations that are providing development resources, services (e.g., consulting, training, hosting) and/or support to OSS programs serving cultural and scientific heritage. This list can be created offline through a shared document or virtual whiteboard.

   o Note: This list may have some overlap with organizations providing home organization / fiscal sponsorship-type services to OSS programs but should only include those organizations that are also contributing other types of resources (development, hosting, etc.).

2. Create an assessment template that includes (at least) the following categories and assign one or more people to the task of filling out the template. A sample template can be found at this link.

   a. Organization name
   b. High level purpose (mission, vision, etc.)
   c. Services offered (e.g., hosting, migration, design/development, etc.)
   d. OSS programs currently supported by the org, if any
   e. Geographic area served
   f. Organization scale, e.g., annual revenue, # of members
      i. Annual revenue for non-profits in the United States can be found on tax form 990. These forms are freely available via services such as Guidestar/Candid.
   g. Core stakeholders and/or funders
   h. General corporate form (e.g., non-profit, for-profit, public benefit)
   i. Does the organization support OSS / open access (with evidence)?
   j. Risks, e.g., language barriers, lack of experience with tech stack, conflicts of interest, etc.

3. Divide the list up among the activity participants and have each fill out the assessment template for their assigned vendor / service provider. Set a target completion date for this work.

4. After the assessment template is complete, share for review with all who will attend the group session.

Activity: Vendor / Service Provider Landscape Analysis

Activity Instructions: As a Group (virtually or in-person)

1. Analyze the landscape by thinking through the following questions (feel free to add your own!):

   a. Does the vendor have a mission/vision that aligns with our program?

   b. What services does this vendor provide that our program does not or cannot?

   c. Does the vendor serve a geographic area we would like to expand into?

   d. Are there risks to consider with this vendor (e.g., reputation, would they overlap with another trusted partner, would it oversaturate a particular market or geographic area)?

2. Take a sticker vote to prioritize the organizations your program is interested in working with. As long as an organization gets one vote, keep them on the list for the next step.

   o In a sticker vote, each participant is assigned several stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

3. If you have identified more than three or four organizations during your brainstorm, you can create a short survey to gauge interest among identified vendors/service providers in participating in a registered service provider program. If you identified a small number, a direct conversation would work well (covering the same questions as below). Useful survey questions may include:

   o Organization name

   o Contact name and information

   o Is your organization interested in participating in an RSP program? A registered service provider is an organization that makes an investment in open technologies and commits to working cooperatively with an OSS program to best serve their community of users.

   o Is your organization currently providing services around your or other OSS programs?

   o Select which benefits would be most attractive – see Creating a Registered Service Provider Agreement for suggestions.

   o Select which obligations they would be most amenable to - see Creating a Registered Service Provider Agreement for suggestions.

Activity: Vendor / Service Provider Landscape Analysis

4. Assign an activity participant responsibility for distributing the survey, collating the results, and sharing with the rest of the participants. Set a timeline for this work.

5. Depending on the results of the survey, agree to shut down the conversation due to lack of interest from potential RSPs (potentially with agreement to revisit the issue in some set period of time), or move on to the exercise Creating a Registered Service Provider Agreement.

Activity: Creating a Registered Service Provider Agreement

Goals

1. Identify the elements in a registered service provider agreement that are important to your program

2. Create a draft registered service provider agreement to share with program leadership

Prerequisites

It's recommended to complete Activity: Vendor/Service Provider Landscape Analysis. This activity assumes that your program has identified service providers to work with.

Who Should Participate?

Program management (tactical)

Length

60-90 minutes

Activity Instructions

1. Review the tables of benefits and obligations below and note whether the benefit/obligation is one your program will or will not include in an RSP agreement. Feel free to add additional elements to the table.

2. For those benefits/obligations that are included, discuss what that will look like for your program; discussion prompts include:

   a. Are there limitations on the benefit or obligation? For example, if a benefit is receiving technical support, is there a ceiling on the number of hours?

   b. Are the benefits limited to RSPs or are they available to others? For example, may everyone using the platform participate in governance, or only members / contributors?

3. Compile the benefits and obligations into a single document to share with program leadership, legal, and fiscal counsel.

   o Note: Keep any draft registered service provider agreement as simple as possible - the more tiers, parameters, and requirements added increase the administrative burden for both organizations and make it less likely that potential RSPs will see the benefit in becoming "official."

Activity: Creating a Registered Service Provider Agreement

Benefits provided to RSP by Program / Organizational Home

Benefits	Will have	Won't have	N/A
Access to documentation (developer, and/or end user)			
Access to listservs and other engagement platforms			
Access to technical support			
Eligible to participate in governance			
Able to use program's logo and/or branding			
Official listing as RSP on program website, other CE platforms			
Certification / credentials (i.e., RSP can say they are certified by the program's home organization)			

Registered Service Provider Obligations

Obligations	Will have	Won't have	N/A
Fees • Tied to anything? Size, in-kind contributions, # of members recruited, etc. • How often are fees paid? One-time? Annually?			
Custom code contributed back to program (program not obliged to accept)			
Open-source licensing			
Limit outreach to certain domains/locations			

Activity: Creating a Registered Service Provider Agreement

RSP Services Provided

Your program may decide that they would like to limit registered service providers to certain services, or only work with providers that support certain services. In that case, use the following table to note which services your program would / would not like an RSP to provide.

Service	Must Have	Must not Have
Installation and configuration		
Data conversion and migration		
Software design and development		
Integration development/support		
Reporting and analytics		
Cloud hosting and/or SaaS		
On-premises support		
Consulting and analysis		
Training		
Customized solutions		

Activity: Building Welcoming Communities

Pre-Work

Have a subgroup (2-3 program representatives) complete the checklist on page 2 and bring it to a larger group for broader discussion and prioritization. It is okay to determine that some components are not relevant or propose adjustments.

Activity Instructions

1. As a group, review the submitted checklist. Does everyone agree or not? Are there elements not included in this assessment?

2. Once general consensus on rankings is achieved, lead the group in identifying what components the group considers necessary to work on, then prioritize (as you cannot do everything at once). Plotting elements on an impact/effort matrix (example on page 4) can aid prioritization.

3. Identify who on the program team will be accountable for working on the component - either taking on the responsibility for creating or improving it or assigning the task to someone else and following up on its completion.

Goals

1. Identify what documentation your program has that supports growing a successful community

2. Prioritize missing documentation and develop a plan for its development

Prerequisites

Example: None

Who Should Participate?

Program management (tactical thinkers), Program staff (operational experience)

Length

60-90 minutes

Activity: Building Welcoming Communities

Building Welcoming Communities Checklist

Does your program have the following documentation?

	Yes	No	In Progress	Unsure	N/A
A friendly README					
Clear code examples					
Code contribution guidelines					
Good first issue tags					
Response plan for new contributors					

Growing Your Community

How can you provide your community with a good foundation for community growth? Do you have the following?

	Yes	No	In Progress	Unsure	N/A
Code of Conduct					
Contributors or Authors file					
Regular newsletter or other communication thanking contributors					
Organizational repository (vs. personal)					
Structured roles for newcomers to fill?					
Clear and transparent communication channels?					
Regular schedule and structure for trainings, onboardings, workshop, etc.?					

Activity: Building Welcoming Communities

Resolving Conflicts

Do you have a plan for conflict resolution as your community grows? Do you have the following helpful tools?
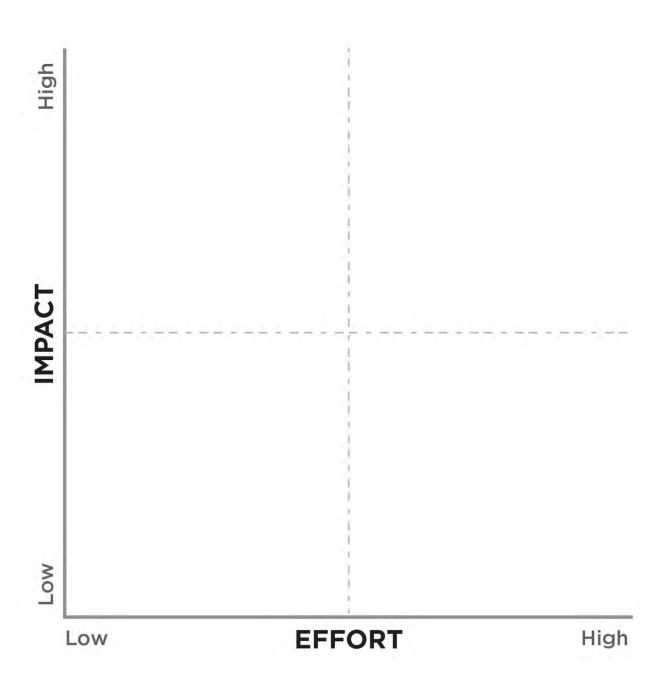
	Yes	No	In Progress	Unsure	N/A
Product vision and roadmap					
Documented decision-making process (e.g. consensus, voting)					
Identified community tiebreaker					

Activity: Building Welcoming Communities

RESOURCES

Phase II: Diversification

Activity: Determine New Forms of Community Engagement

Goals

1. Determine what kind of engagement is right for your community

2. Map stakeholder groups with nascent activities you want to support

Prerequisites

CE Activity: *Who is Your Community?*

Related Activity

CE Activity: *Create Communication and Engagement Plan*

Who Should Participate?

Outreach Committee members; program management (tactical thinkers) and/or community members

Length

60-90 minutes

Activity Instructions

1. Review stakeholder groups prioritized in CE Activity: Who is Your Community?

2. Review CE Activity: Create Communication and Engagement Plan (or equivalent) for goals, priority stakeholders and engagement level so far

3. Determine the desired next level of engagement

4. Consider what new types of engagement activities you might like to pilot with your community. Examples could include:

   i. Onboarding

   ii. Hackathons

   iii. Training
       1. in person
       2. online
       3. specialized topics

   iv. Documentation
       1. translating documentation in different languages

   v. Mentoring/shadowing

   vi. Regional groups
       1. create regional/national coordinators, give frameworks, tools, presentation templates, agenda templates
       2. program ambassadors

   vii. Credentialing system (way to validate or approve skills, track time)

   viii. Knowledge sharing/Question answering
        1. office hours
        2. lessons learned

5. Map stakeholder groups with nascent activities you want to support (template below). You can take the time to go through this with all stakeholder groups, but you may want to focus on prioritized stakeholder groups.

6. Use a sticker vote to choose 2-3 activities to pilot over the coming year.

Activity: Determine New Forms of Community Engagement

- In a sticker vote, each participant is assigned a number of stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).

7. Document decisions so everyone is clear on why you chose as you did.

Template (examples in _blue italics_)

Stakeholder group	Pilot engagement activity
Code contributors	_Hackathon_
End users in Spanish speaking countries	_Translating user documentation into Spanish_

Output

Prioritized activities to pilot.