



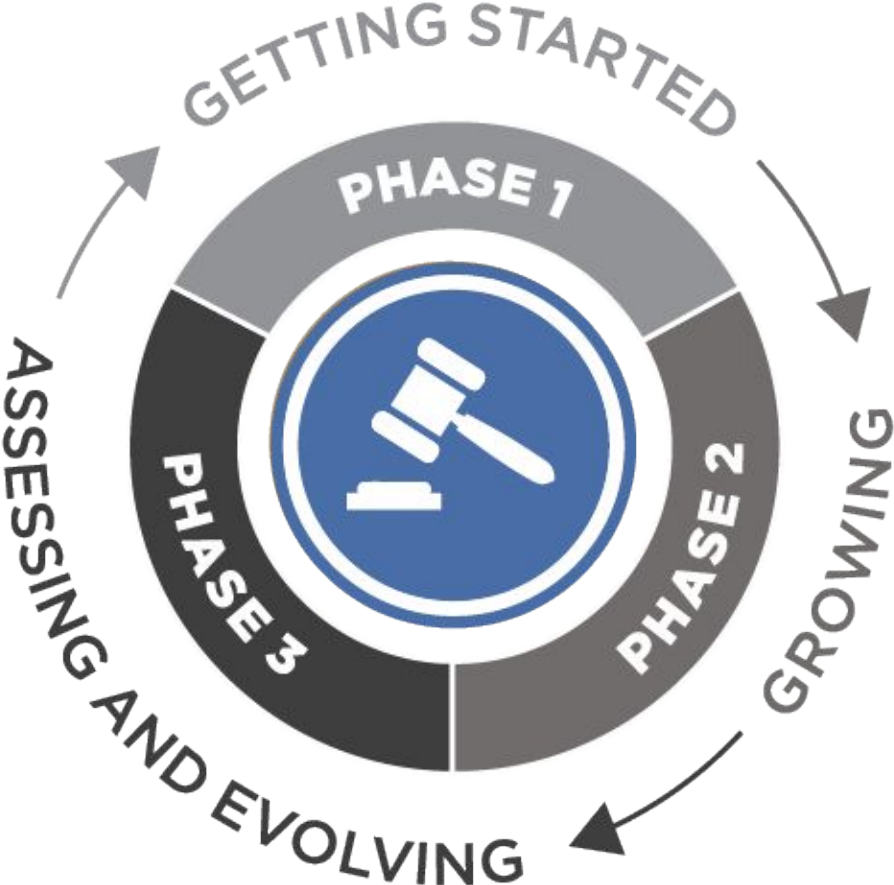
## ALL FACETS, ALL PHASES

Getting Started, Growing, Assessing and Evolving

### Activity: ITAV Analysis Kickoff Phase Analysis Checklist Slides

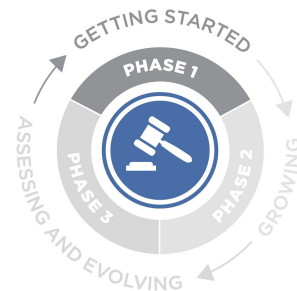
- The ITAV Analysis Phase Analysis Checklist Slides are designed to be used during in-person ITAV Analysis Kickoff meetings. To see where these slides fit into the broader meeting agenda, visit the [ITAV Analysis Kickoff](#) page on the ITAV website.
- You are welcome to customize the slides as needed for your program; for example, if your program is more mature, you might wish to edit out some of the Phase 1 Objectives.
- To create a copy of the slides that you can edit and share, go to the File menu and select “Make a Copy.”
- Delete this slide before your meeting.

# GOVERNANCE OBJECTIVES



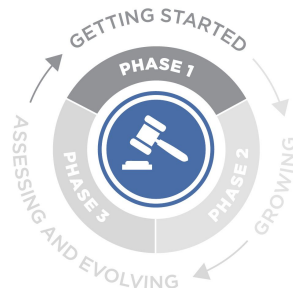
# Define a need for governance

Have your staff and community determined what type of governance structures are needed based on existing issues? Examples include tension between technical and functional teams, real or perceived lack of transparency, or a need for more community engagement.



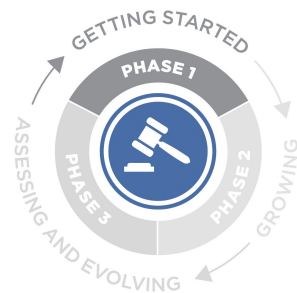
# Review existing governance models

Has your program looked at examples of governance models from other programs to understand the options available?



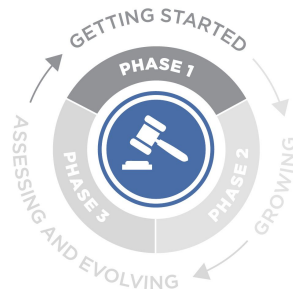
# Select the governance model that works best now for the program

Has your program drafted a governance model, and put it to the test with use cases from your day-to-day work?



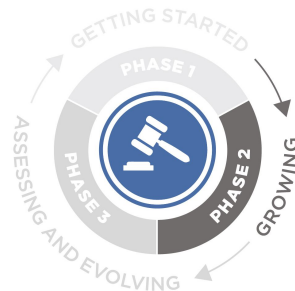
# Communicate changes to stakeholders

Have you shared the draft governance model with stakeholders and users? Is it easily findable and understood by the people it affects?



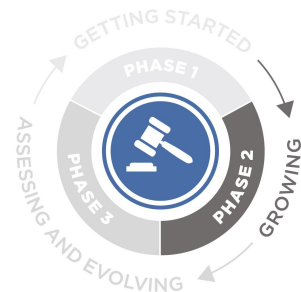
# Document existing governance policies

Are your existing policies for code contribution, technical roadmapping, strategic planning, policy decision making etc., documented and available for the community to access?



# Evaluate each element of existing governance

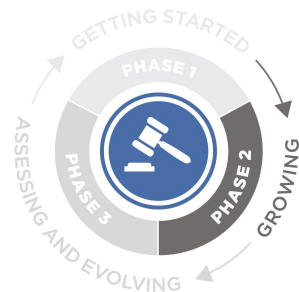
Have you worked with program staff and the community to evaluate if the structure and policies that are in place are actually working?





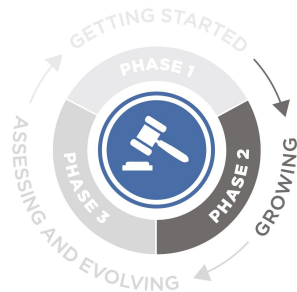
# Increase community engagement with governance

Have you worked to increase community engagement with governance, ensuring that program leadership doesn't think governance works well simply because it happens to work well for the program team?



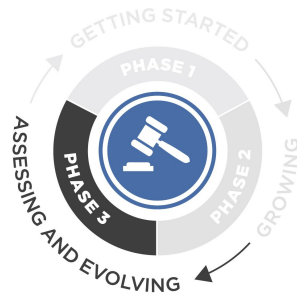
# Evaluate long-term organizational home options

Have you explored engaging a fiscal sponsor or nonprofit to serve as a home or sponsoring organization?



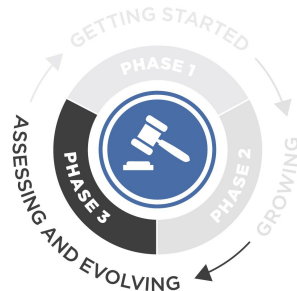
# Create and support consistent governance structures

Does your community feel like it has a trusted place for making contributions of time, effort, and resources? Is there a succession plan?



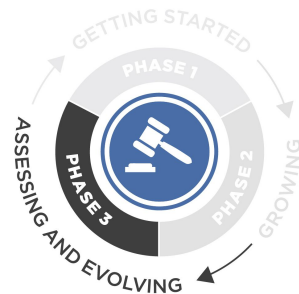
# Evaluate and evolve governance practices

Have you evaluated and evolved its governance practices as priorities, funding streams, and technologies have changed?

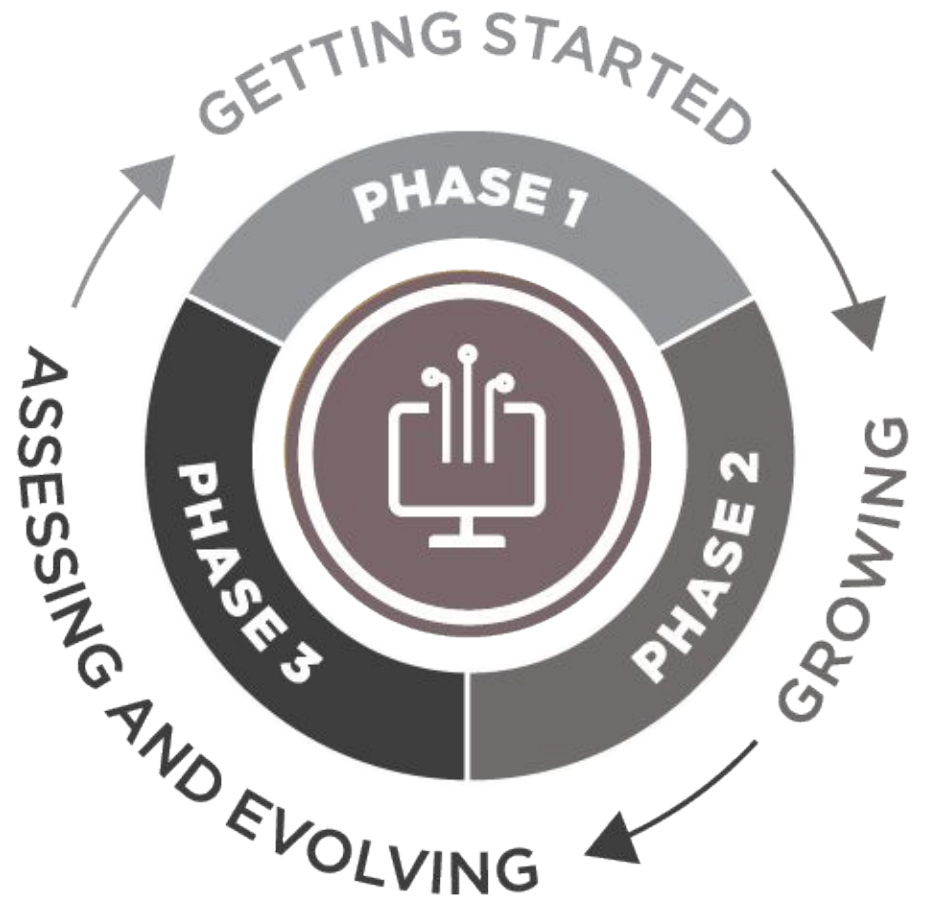


# Expand community participation in governance

Have you worked to ensure that governance representation matches the makeup of their community and key stakeholders?

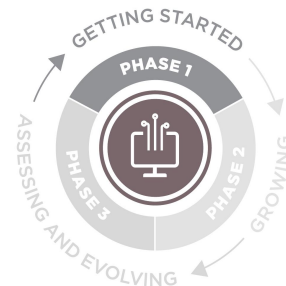


# TECHNOLOGY OBJECTIVES



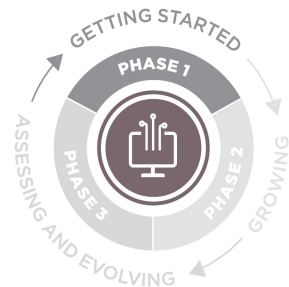
# Work to understand core community needs

Has your program evolved from working within a single organization to gathering input and feedback on program priorities from the broader community?



# Continue to gather data after moving from design to dev

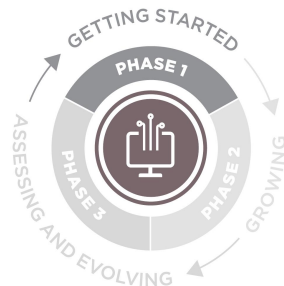
Has your program continued to analyze community needs as the project moves from design to development? Are community members being engaged early with testing and documentation?





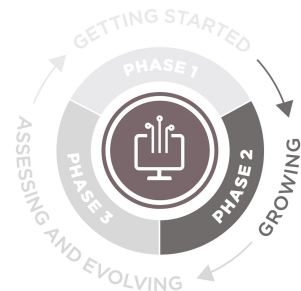
# Communicate progress and process with stakeholders

Has your program inspired confidence and engaged stakeholders by being transparent during the design and development process with open code repositories, public bug traces, and regular releases?



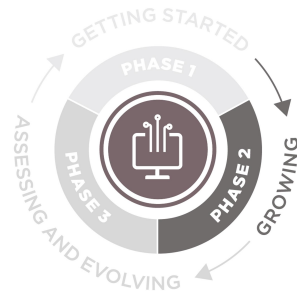
# Engage the community

Has your program worked with the user community to understand what is working, what features/functionality are most heavily used, and how the application could be improved?



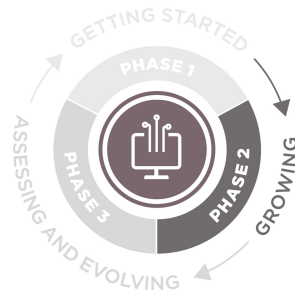
# Grow thoughtfully

Has your program worked to balance new features and functionality with maintaining a stable infrastructure and up-to-date documentation?



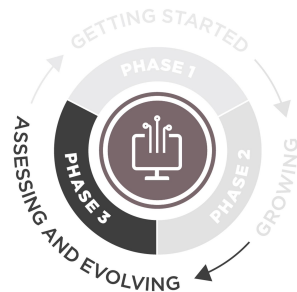
# Consider integration over new development

Has your program integrated or considered integrating with existing OSS rather than adding new features directly to the core platform?



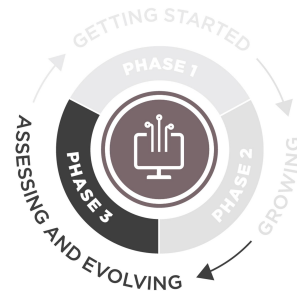
# Reassess community needs

Has your program carried out a core community needs assessment to understand how community needs have evolved since the program began?



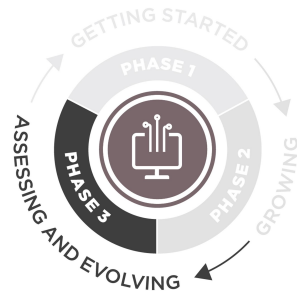
# Plan for evolution

If your program's community needs still align with functionality provided by the platform, is there a plan to evolve the technology to keep is stable and sustainable?

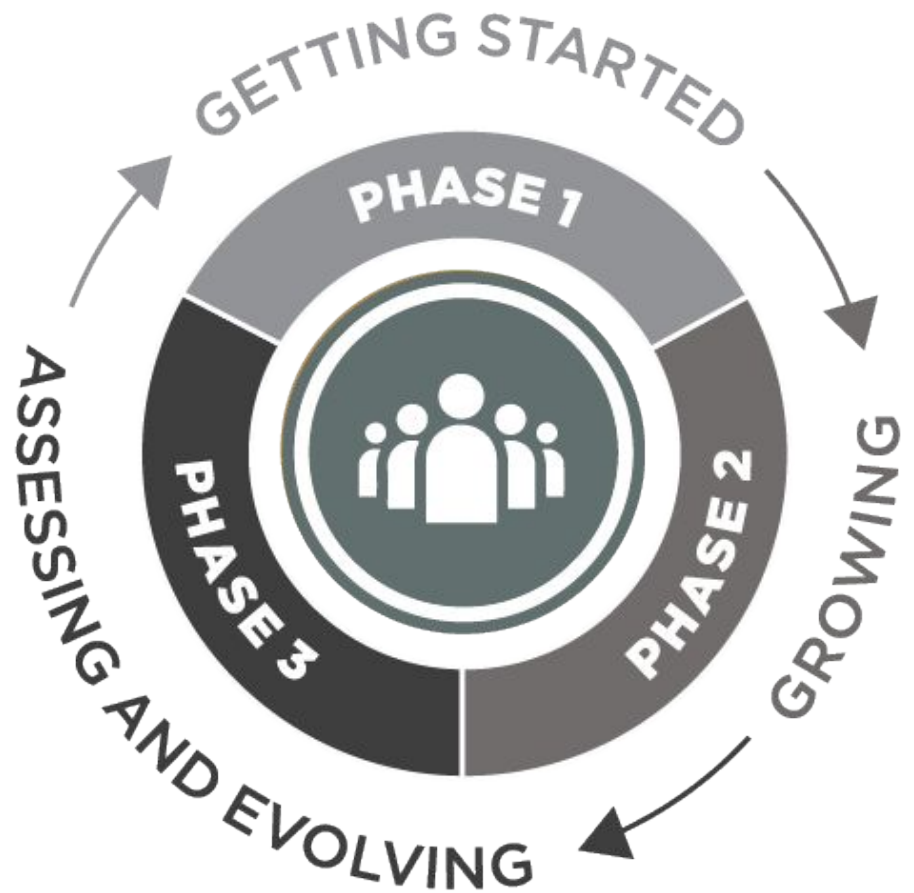


# Document an exit strategy

If community needs no longer align with the platform, are there any plans to retire it?



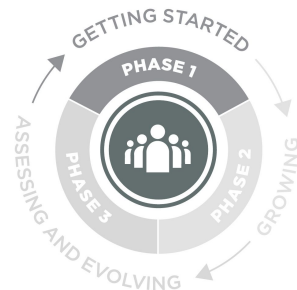
# RESOURCES OBJECTIVES





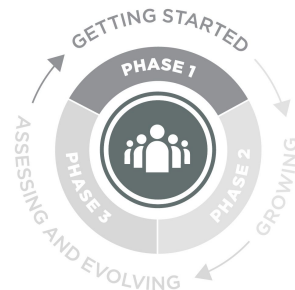
# Undertake business and financial sustainability planning

Has your program made an effort to understand the application's market and end users, and the options for attracting long-term, dedicated resources?



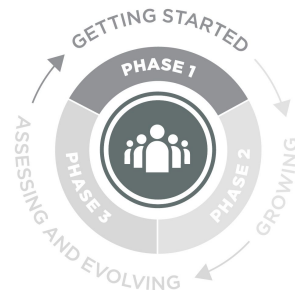
# Determine human resources needed to move forward

Has your program determined the core set of people and skills required to support program priorities?



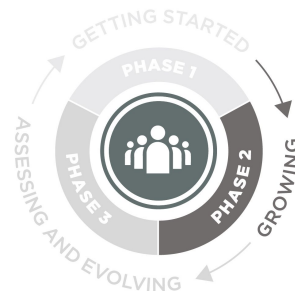
# Explore partnerships and collaborations

Has your program explored partnerships with similar communities or engaged with potential fiscal sponsors or nonprofit organizational homes?



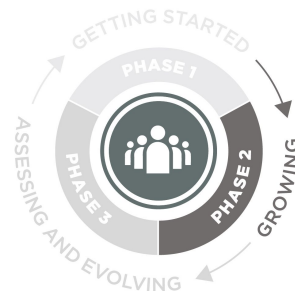
# Expand the community of funders and contributors

Has your program sought to expand the community of funders and contributors, or explored adding new revenue streams?



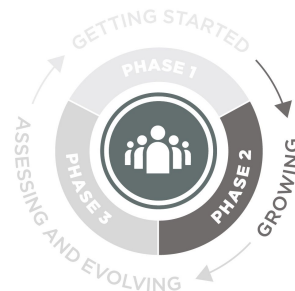
# Work with vendors to support development needs

Has your program explored creating or expanding a network of Registered Service Providers?



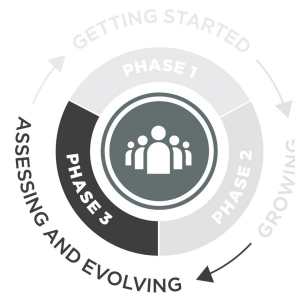
# Cultivate expectations around community contributions

Has your program established structure and clear expectations around contributions for its stakeholders?



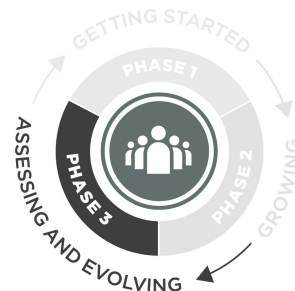
# Focus on alliances with leading institutions

Has your program explored partnerships with leading organizations that can provide steady sources of income and in-kind contributions?



# Shift business model in response to external events

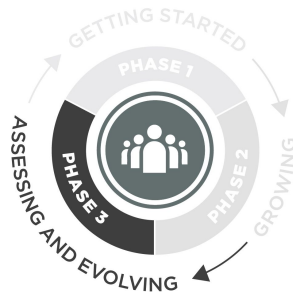
Has your program evaluated its revenue mix against current trends in OSS, cultural heritage, and academia? These can be positive trends like a shift to open, or negative like decreased funding for higher ed.



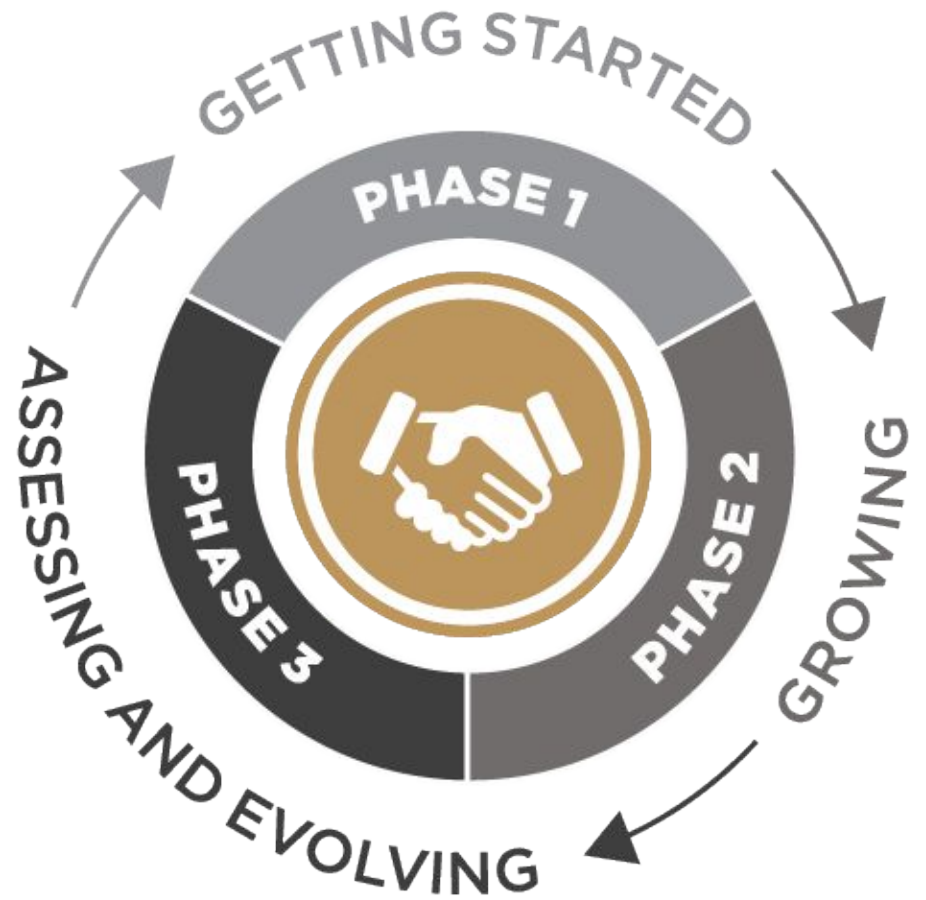


# Calibrate revenue streams to a global economy

Has your program adjusted its financial expectations to improve participation from users in developing economies?



# COMMUNITY ENGAGEMENT OBJECTIVES



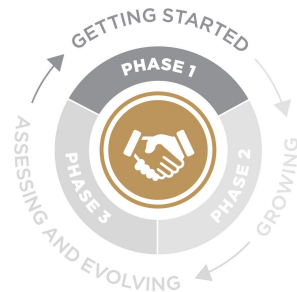
# Identify and involve a wider group of stakeholders

Has your program worked to expand the community involved in the program, and to involve new users in program growth and development?



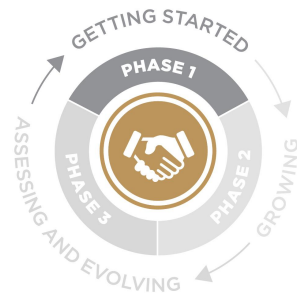
# Form an outreach committee

Does your program have a group responsible for carrying out community engagement activities?



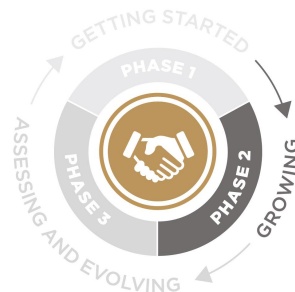
# Formulate and implement a comms and engagement plan

Does your program have a formal strategy for engaging its community and has that strategy been implemented?



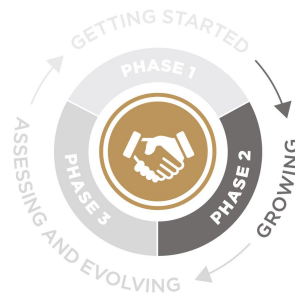
# Set up process and infrastructure to facilitate engagement

Does your program have a cohesive overall message, and policies that guide and foster engagement such as contributor guidelines, codes of conduct, onboarding policies, etc.?



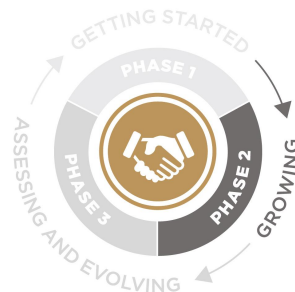
# Increase non-directed community activities

Has your program empowered stakeholders to be ambassadors for the program? Encourages informal community-led activities?



# Increase transparency

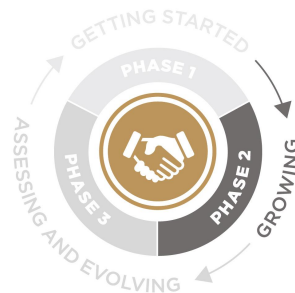
Does your program's community understand how decisions are made and what program priorities are?





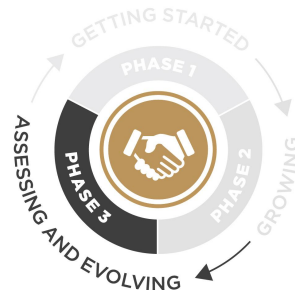
# Provide dedicated staffing for engagement

Does your program have staff with time dedicated to community engagement?



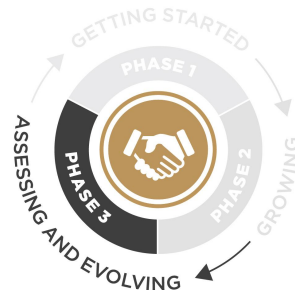
# Engage a more diverse set of engaged participants

Do participants of all backgrounds and skill sets feel comfortable engaging with and contributing to your program?



# Empower the community to support each other

Does your program have mechanisms and processes that enable community members to help each other out, things like blogs, easy to update documentation, forums, or arenas for active community discussion?



# Establish ways to continually evaluate community engagement

Does your program have a formal way to evaluate the efficacy of its engagement strategies and adapt them as necessary?

