Activity: Core Data Worksheet

Goal

Gather the "core data" for each facet in the ITAV framework.

Prerequisites

None

Who Should Participate?

Program management (tactical thinkers), with input from Program leadership (strategic thinkers) and staff (operational expertise) as needed.

Length

60 minutes

Used For

Any program getting started with an It Takes a Village (ITAV) analysis. The core data worksheets can be used by programs who are new to ITAV, or to update the baseline for those who engage with ITAV on a regular basis.

Activity Instructions

Complete the core data worksheet for each facet. Questions might not apply to your program – it's fine to skip questions or make adjustments to reflect your program's realities.

If a question is yes/no or multiple choice, you can ==highlight== or **bold** the appropriate answer. If a longer-form answer is needed, write it in an indented bullet below the question.

Activity: ITAV Analysis Kickoff

Governance

- Is there any formal governance of the OSS? [Y/N]

  o If yes, does the governance extend beyond the originating institution/entity that created the product? [Y/N]

- Do you have a wide range of community participation in governance? [Y/N]

- Has existing governance experienced more than one issue in the last 18 months that couldn't be resolved within your current structure? [Y/N]

- Do all governance members regularly participate in scheduled meetings? [Y/Varies/N]

- Do you have terms of service, appointments, or an election process? [Y/N]

- Have you made any modifications to governance structures since the program started [Y/N]

- Have you done any evaluation of governance structures in the past 3 years [Y/N/other]

- Do you have documented existing policies for (include links as relevant):

  o appointments to councils/working groups [Y/N/NA]

  o code contribution [Y/N]

  o road mapping [Y/N]

  o strategic planning [Y/N]

  o policy decision making [Y/N]

Activity: ITAV Analysis Kickoff

Technology

- Approximately how many individuals are actively contributing code (within the past year)? (choose one)

  - 0
  - 1-5
  - 6-10
  - 11-20
  - 21+

- Approximately how many organizations are actively contributing code? (choose one)

  - 0
  - 1-5
  - 6-10
  - 11-20
  - 21+

- Does the program have a technology roadmap? [Y/N]

  - Is it publicly available?
  - How often is it updated?
  - Link here:

- How long ago was your last major release? (choose one)

  - 0-6 months ago
  - 6-12 months ago
  - 12-24 months ago
  - More than 24 months ago

- What is the next major technology milestone for the software?

- Is the software currently integrated with any other systems? [Y/N]

  - If yes, are these integrations essential to the software's success or value proposition?
  - Do you have any integration work on the technology roadmap?
  - Do you have any potential integrations (i.e. not on the roadmap)?

- Have you done any surveys/focus groups or other ways of assessing community needs? [Y/N/Other]

- Are code contribution processes clear, transparent and openly available to stakeholders? [Y/N/Other]

Activity: ITAV Analysis Kickoff

Resources

- Does the program have paid staff? [Y/N]

  o If so, how many FTE?

- Have you identified any additional staffing needs?

- What is the current annual budget for the project/program?

- What are the sources of revenue for the past three years? What is the implementer and/or member retention rate, growth rate and cumulative turnover rate?

  o *Optional*: Use the linked spreadsheet template with the last 3 years of revenue data. Customize the template for your program to include membership and/or any other sort of revenue

- Have you explored alternative revenue sources and/or adding new sources?

- How many stakeholders contribute financially? (choose one)

  o 0
  o 1-5
  o 6-20
  o 21-100
  o 101-250
  o 251-400
  o 401+

- Have you conducted a market analysis to understand the current and total available market? [Y/N]

  o If yes, please provide/link to it.

- Do you have service providers that help you or the community? [Y/N]

- What do they contribute? (check all that apply)

  o Financially (include estimate or range?)
  o Development resources
  o Other such as event planning, contributing documentation, etc.

- Do you have any strategic partners?

- Do you have established expectations around contributions (financial or otherwise) from partners, stakeholders, service providers, or others?

Activity: ITAV Analysis Kickoff

Community Engagement

- Who is your target audience?

- Do you have a documented communications and engagement strategy? [Y/N]

- Total installed base *estimate* – how many organizations are **using** the OSS? (choose one)

    o 0
    o 1-100
    o 101-250
    o 251-500
    o 501-1000
    o 1001+

- What is the percentage of **users** globally? (approximate percentage for each)

    o Africa
    o Antarctica
    o Asia
    o Australia/Oceania
    o Europe
    o North America
    o South America

- In what ways do institutions contribute to the program? (choose all that apply)

    o Code contributions
    o Testing
    o Documentation
    o Domain expertise
    o Financial contribution
    o Leadership
    o Outreach/advocacy
    o Peer support
    o Other, please specify [text]

Activity: ITAV Analysis Kickoff

- What is the rough percentage of institutions contributing any of the above (e.g. documentation, money, QA resources) to the program? (choose one)

  o 0%
  o Less than 25%
  o 25%-50%
  o More than 50%
  o Please describe restrictions, if any. [text]

- Provide links as relevant for the following if your program has:

  o Wiki
  o Website
  o Social media
  o Listservs or online forums
  o Training and/or seminars
  o Code repository
  o Newsletter
  o Conferences