

Best Practices Guideline for Managing Open Source Applications

Streamlining Open Source Management Practices

In order to extract the maximal returns from open source applications, organizations must: (1) Create a cross-functional governing body to oversee all open source Initiatives and (2) Design and institute effective and comprehensive open source policies.

Steps to Consider

- 1. Create a cross-functional governing body to oversee all open source initiatives:** To ensure effective management of open source applications, organizations should form a cross-functional governing body composed of individuals from the following groups: finance and budgeting, enterprise architecture, application development, legal, end-user support, human resources, procurement, operations and executive management. The primary responsibility of this Open Source Management Team (OSMT) is to ensure that proper due diligence and quality assurance is applied and all appropriate policies and procedures are followed. The OSMT will also work in tandem with the Open Source Support & Development Team (OSSDT)—group of internal developers—to certify and approve the usage of any new open source application, as well as to validate any modifications made to existing open source applications. **Key Responsibilities of the Open Source Management (OSMT) and Support & Development Teams (OSSDT) includes:**

1.1 The Open Source Management Team (OSMT) is responsible for:

- o Designing and instituting all open source policies, processes, and procedures
- o Ensuring that all open source initiatives are in line with organization's underlying strategic objectives

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- o Creating an inventory of all open source applications used within the organization
- o Providing a website to enable open source users to communicate and share information
- o Building and monitoring a central repository that stores all information about approved open source utilities, standards, tools, and documentation
- o Constantly looking at what peer companies are doing and utilizing industry research to identify open source management best practices
- o Conducting regular code reviews to ensure that open source policies and standards are adhered to
- o Creating a set of legal guidelines and educating developers on the legal risks associated with open source
- o Studying approved open source applications' licensing agreements to form appropriate legal guidelines

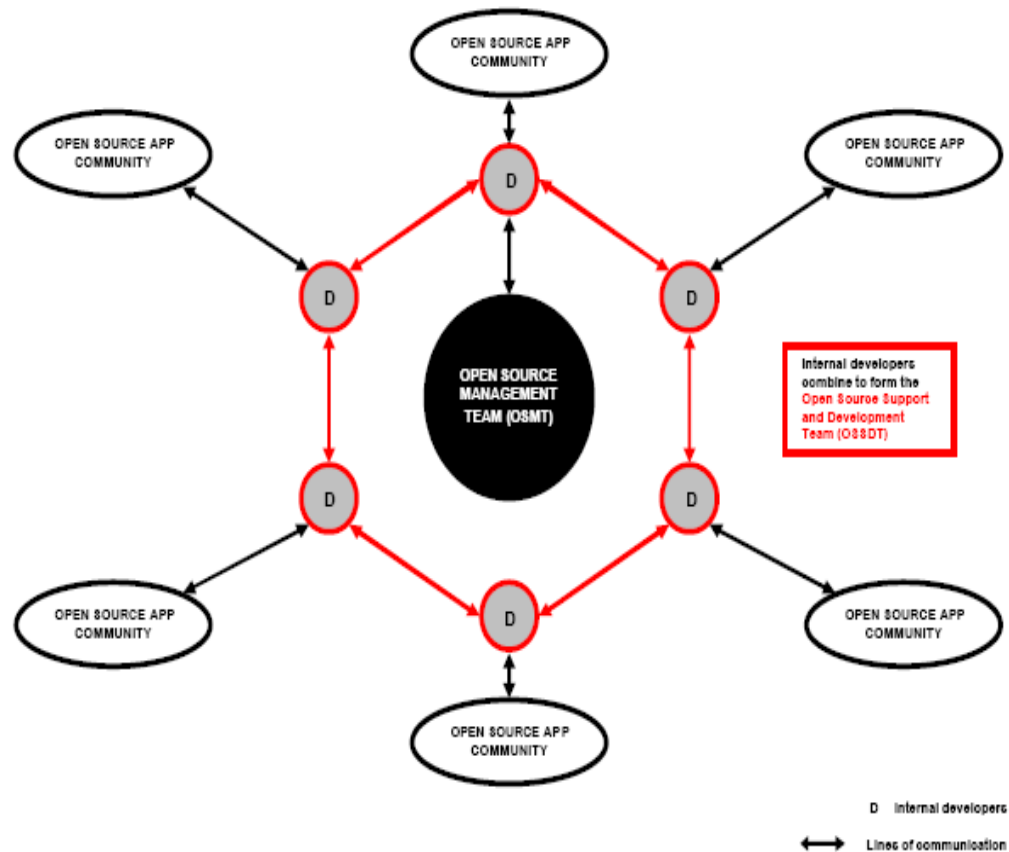
1.2 The Open Source Support & Development Team (OSSDT) is responsible for:

- o Training staff on key open source applications
- o Presenting business value of open source application to the OSMT to obtain executive buy-in
- o Pioneering to find utilities that both solve any particular problem facing the organization and meet existing open source standards
- o Continually monitoring the Web for any new developments, and checking with OSMT to see if anything warrants extraction and support

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- o Distributing approved open source applications and formulating documentation to guide end-users
- o Maintaining approved open source applications through code and security reviews

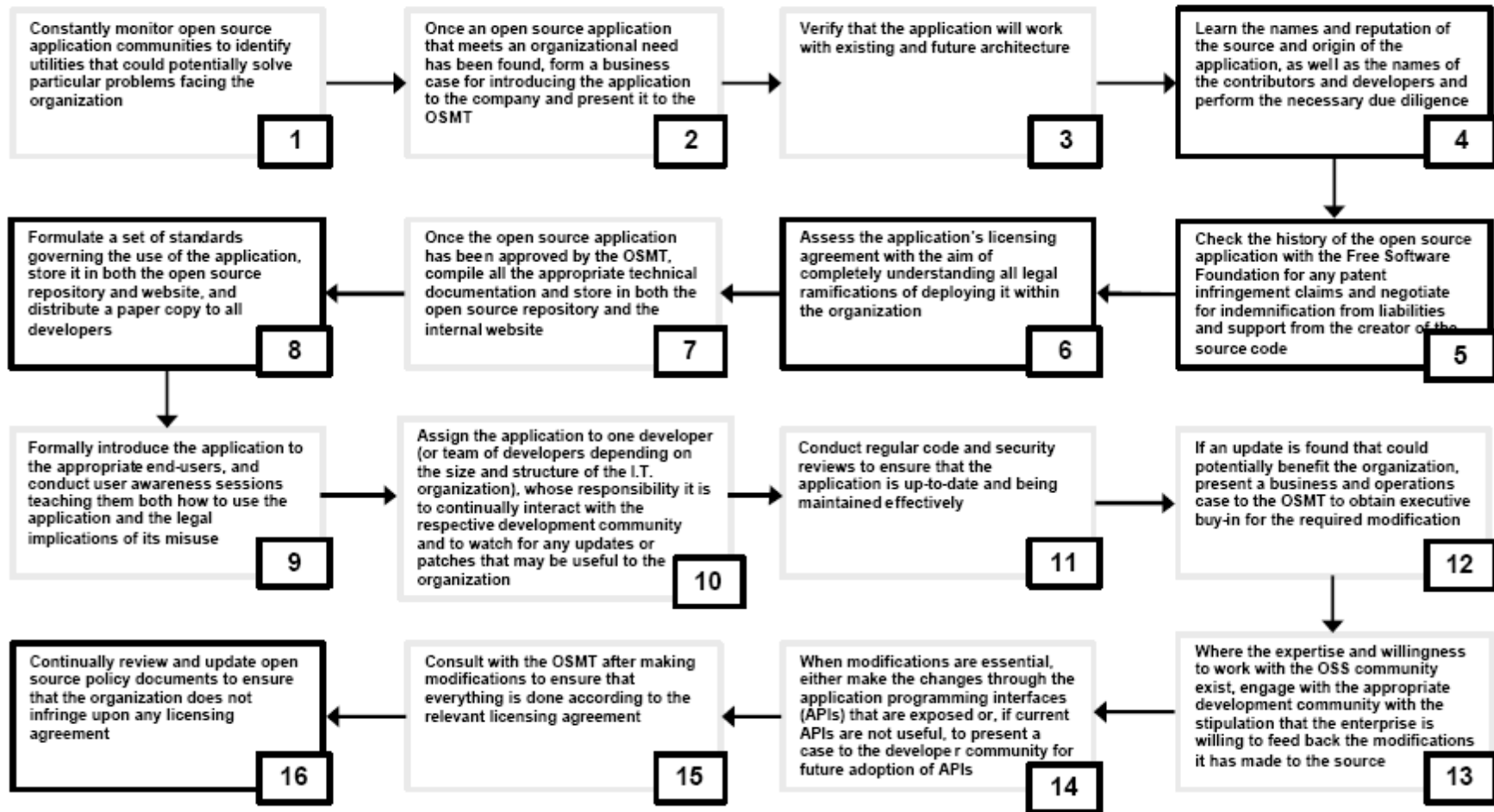
1.3 Lines of Communication in a Progressive Open Source Management Environment



Every developer (or team of developers) is assigned one open source application, and maintains contact with the external development community that specializes in work related to that application. Each developer therefore communicates with all other developers (through the Open Source Support and Development Team (OSSDT)), his individual open source application development community, and the Open Source Management Team (OSMT).

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2. Design and institute effective and comprehensive open source policies



Gray — Tasks to be completed by the Open Source Support and Development Team (OSSDT)
 Black — Tasks to be completed by the Open Source Management Team (OSMT)

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Practice Profiles

<p>1. Create a cross-functional governing body to oversee all open source initiatives</p>	<p><i>Fidelity (Industry: Financial Services) created an Open Source Support Center to approve open source code before deploying it, and to validate any modifications made before sending it back to the appropriate development community. FMR Also created a central repository linked to all development communities so as to pinpoint any necessary updates or patches.</i></p>
	<p><i>Anthem ((Industry: Health care) created a team of enterprise architects in charge of identifying appropriate open source applications from the Web and presenting the business case to a cross-functional open source steering committee. Anthem also launched a website to store all information about open source utilities, standards, tools, and documentation. In addition, the company formed a governing body to ensure that proper due diligence is applied and to enforce appropriate policies and procedures.</i></p>
	<p><i>Texas Instruments (Industry: Electronics) formed a technology group aimed at verifying the feasibility and usability of open source applications, as well as approving and launching the application. The company also created a website to present all open source standards, and to advertise frequent user awareness meetings and training sessions.</i></p>
<p>2. Design and institute effective and comprehensive open source policies</p>	<p><i>FMR (Industry: Financial Services) heavily integrated its legal department into its open source practices to create a set of legal guidelines to govern the use of open source applications within its infrastructure.</i></p>

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	<p><i>Texas Instruments (Industry: Electronics) formulated a set of standards to regulate the use of open source applications, and to use as a benchmark when deploying new utilities within its software environment.</i></p>
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