

01: Title Slide

Today I'd like to offer a reconsidered value proposition for open, collaborative inter-institutional projects. It's a polemic, and worse: it has a historical trajectory.

Let me apologize for starting in 1999, when Red Hat - a Linux company named in part after "several historical revolutionaries who wore red hats" - becomes a publicly traded company covered in the NYT.

02: 1999 OSS in the news, Cathedral and the bazaar on O'Reilly

1999's *The Cathedral and the Bazaar* by Eric Scott Raymond defined open software projects by their users' open access to source code and the resulting accountability of design decisions.

It references anarchist organizing, reads "The Mythical Man Month" as a critique of conventional management, endorses participant decision making and early release cycles, and notes the impact of networked communities of use on project direction.

03 2002 Infonomics in EU

Understanding open software via the uneasy positioning of prominent early OSS figures vis a vis actual historical revolutions was not helped along by free software advocates' "free as in [speech, beer, puppies]" characterization of projects and products.

Adoption anxiety prompted the European Commission to fund a year-long analysis of the behavioral economics of open source, and in 2004

4 2004 OSS for Managers Presentation

Sebastian Rahtz gave a talk for OSS Watch from which I draw the title of this presentation.

Though OSS Watch strived not to advocate per se, Rahtz argued against some vendor rhetoric in an honest appraisal of the strengths and weaknesses of bazaar-style OSS - including moving to open source, as Rahtz did with the TEI Initiative.

Meanwhile, in the non-Microsoft corporate world...

05 2015 Corporate

Jim Whitehurst's *The Open Organization* discusses the post-2007 application of bazaar-like open process to everything from party planning to creation of mission statement at Red Hat.

RH marshalls an open source community to address the US Navy's need for a "real time kernel" to develop antimissile systems to defend aircraft carriers from smaller boats by identifying common benefits for other organizations, like Goldman Sachs and JPMorgan Chase.

06 2015 Military

And by 2006 the JSOTF in Iraq is reorganized around radical information sharing, comprehensive mission communication, and staff empowerment.

McChrystal's reorganization references successful terrorist groups, a reading of "The Mythical Man Month" as a critique of conventional management, participant decision making and early feedback cycles, and the impact of networked communities on strategic adaptation. Like Raymond, McChrystal reflects on the Maginot Line as allegory of the post-industrial problems of early 20C management principles.

07 2019 Open Source as an Organizational Strategy

I make these observations not as a criticism of open processes, but of the idea that they have much in the way of inherently liberatory politics. Rather, the bazaar is a generalizable strategy for working in complex environments with rapid feedback cycles.

Management Challenges

08 MC: Remote work

I'd like to briefly pivot here to some challenges I've faced leading a reorganized-into-existence team of developers. Transit infrastructure, negotiated compensation and real estate pit a nationwide trend toward flexible work arrangements against a "meeting rich" local workplace culture.

09 MC: Onboarding, Documentation, Change Management

Aside from churn, as the product of a reorganization, much of the team had to be onboarded; we are still working to dismantle the staff "micro-silos" of project programmers.

10 MC: Dynamic Priorities & Resourcing

The sudden appearance of grant obligations, the decentralized agenda setting of the organization, and the apparently universal need for digital infrastructure and publishing make our agenda unstable.

11 MC: Consensus Building

The competition for project priority creates a contentious environment for the decision of what should we do, how and when we should do it.

12 MC: Goals and Mission Definition

The very process of project proposal can obstruct a mutual, organization-wide understanding of why we should take a given project up, much less defer another.

13: Problems Everyone Has

Anyone who has worked on a consortial project will be familiar with these issues, and that is precisely my point: These are common challenges, and the governing characteristics of bazaar-style project environments are present in modern management scenarios from software development to river basins to crisis communications.

14: Collaborative Work Reflects the Work to Come

Removed from the specific context of software development, the bazaar style offers a collaborative model for environments that are rendered unpredictable in a Taylorist sense by network effects and rapidity of feedback - not universal approaches, but necessary skillsets for realizing the value of mission statements and identifying the conditions for effective staff empowerment.

15: Community is a requirement, not an outcome

With the possible exception of Red Hat's mission statement creation, the open process is predicated on the existence of a community, be it of practice or organizational affiliation. Community definition is certainly a worthy goal, but is a poor fit for a strategy fitted to empowerment of networked entities assumed to have cohesive shared goals.

16: Blacklight

To illustrate by example: Last year, my team observed that the protracted release candidacy of Blacklight 7 was impairing team practice and policy. The project needed contributors to triage remaining issues, identify stakeholders, and verify and document changes - less programming tasks than release management.

17: Samvera

Another: the Samvera Project's governance program included the formation of a CCMWG, both to manage flux around shared components and to document the use and advocate sunsetting of those components. Participating in these efforts is an exercise in project and portfolio management with direct relevance to our projects "at home."

18: ITAV

I'd like to draw attention to two efforts - the "It Takes a Village" project and guidebook, and the Invest in Open Infrastructure framework - that are both important (please read their reports) and not what I'm talking about. Both are an examination of governance around sustainability - funding and practice - and an embodiment of open processes.

19: IOI

These projects take as read the intrinsic value of open-ness, and are framed around identifying long-term survival strategies for collaborative efforts. Important goals, but the 20 year conversation around adoption and support glosses what I'd argue is a critically important aspect of our thoughtful participation in these projects:

20: Conclude: Pursuing Open Strategies Requires Open Project Experience

Our institutions need leaders that can operate in the contexts the bazaar model of open organization works well in, to say nothing of professional development trajectories for IT managers from practitioner staff. Participating in open, collaborative efforts offers a concrete development program for these skills.

21: Farewell