



# I. Open Source Philanthropy Resources

11/2/2006

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## 1. Introduction

The Open Source Philanthropy program of the CFA is not just about technology. In the words of its offering memorandum: "Open Source Philanthropy (OSP) delivers ideas, tools and services designed for a new 'golden age of philanthropy'."<sup>1</sup> OSP sets out to develop a knowledge network providing transparent publication of information vital to a living and growing community of philanthropy.

So what does this mean? What follows is an effort to pull apart the interplay between how ideas and technology are developed, how tools can be used to build a web of dynamic philanthropy, and how this web will further the development of ideas and new technologies.

## 2. What Is The State of Open Source Philanthropy Now?

The size of the Open Source movement is illustrated by a simple metric: a Google search on "open source" comes back with 252 million hits. The movement is fertile ground for hype and media exaggeration, debate and vitriol, and even some successful software products. Open Source is big, and a long list of major corporate players has chosen to make it a part of their product and service offering.

In contrast, the role of the Open Source movement in philanthropy has been marginal. Change the Google search to "open source philanthropy" and you get 163 hits (no zeroes). This is going to change.

CFA's Open Source Philanthropy (OSP) program makes a distinction between the development of community intellectual property and the identification of community accessible tools. The program seeks a balance in promoting community based clarification of the ideas in philanthropy, and in the adaptation and use of tools to further these ideas.

### *A. Open Source Design for Philanthropy*

The goal of developing community intellectual property reflects OSP's commitment to knowledge networking and finds resonance in the Open Design<sup>2</sup> movement. This movement promotes collaborative thinking and group problem solving. It shares roots with two decades of workgroup software (such as Lotus Notes, Novell Groupwise and MS SharePoint). But rather than the results being owned by a corporate entity, Open Design (and OSP) seeks community participation, ownership and benefit.

Three pillars under gird the Open Design movement:

- Collaboration - sharing and transparency,
- Precedent - building on successes, and
- Practice - experimentation.<sup>3</sup>

No better guide could express the goals for Open Source Philanthropy.

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<sup>1</sup> See full text of memorandum at <http://www.cfamerica.org/page31003.cfm>

<sup>2</sup> See [http://en.wikipedia.org/wiki/Open\\_design](http://en.wikipedia.org/wiki/Open_design), and <http://www.thinkcycle.org/>

<sup>3</sup> Robert Adkins, (2004) <http://www.technetra.com/writings/archive/2004/01/18/open-source-protected-philanthropy>



The CFA has consistently championed a community based approach to the development of intellectual capital within the foundation space. By virtue of its track record over the past six years<sup>4</sup>, new concepts and business models serving philanthropy have been explored, refined and disseminated. CFA's practical solutions have spanned:

- **Subject areas expertise:** from marketing to working with financial institutions, to web presence and product definition, CFA has led the field in developing mindshare around new ideas.
- **Technology:** from developing relatively low-tech document templates to designing XML schemas controlling the flow of information between custodial banks to a foundation's GL, CFA's role as the field's R&D department.
- **Provider relationships:** CFA has demonstrated that different projects require different kinds of vendor relationships, from close direct supervision of software development to stand-off resourcing of critical enhancements.
- **Knowledge Development:** using groups of foundation leaders (be it in roles of governance, service on task forces or at conferences) and integrating critical industry voices into this process has been key to CFA's ability to harness and expand expertise in the field.

CFA's success in offering practical solutions for the field is testament to the effectiveness of the core values of collaboration, precedent, and practice. The CFA Open Source Program is a logical extension of this track record.

## ***B. Free Open Source Software in Philanthropy***

The more tool oriented aspect of OSP is aligned with the more conventional open source movement. It is known as Free Open-Source Software (or FOSS), and defines these tools in terms of their use: *"Free software is a matter of the users' freedom to run, copy, distribute, study, change and improve the software."*<sup>5</sup>

The Open Source movement has had mixed reception in the nonprofit sector. On the one hand, the culture of freely distributed software is appealing to those seeking to make political anti-corporate statements and/or lower the costs of technology. On the other hand, most of the products that have emerged targeting nonprofit needs have been small in scale and not widely adopted.

Successful use of open source software in the nonprofit sector includes:

- **Desktops:** many have successfully pursued the deployment of desktops running variants of Linux and the OpenOffice desktop suite.
- **Servers:** the Linux operating system is a popular platform for servers:
  - Built in NFS and Sendmail provide file and mail server functions.
  - Web servers: most use Apache web server software.
  - Databases: Most open source products use MySQL or Postgress.
  - Lists: many use LISTSERV and some use discussion forum apps.

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<sup>4</sup> See CFA track record: <http://tinyurl.com/y6mfpb>

<sup>5</sup> See <http://en.wikipedia.org/wiki/FOSS> and <http://www.gnu.org/philosophy/free-sw.html>



Missing from this list of successful implementations are applications devoted to the operations of nonprofits. Not that options are not available to do accounting, CRM, and even case management, but they tend to exist in isolation of each other. Many of the applications developed by and for nonprofits also suffer from being “young”: they have grown out of the needs of a particular organization and either embed that organization’s business logic deep into the actual code, or lack the configuration capabilities to apply it to a new context.

This state of isolation and immaturity of open source software for the nonprofit sector is compounded by two structural issues:

- The fragmentation of the nonprofit marketplace, by geography, core mission and size, creates barriers to clear articulation and development of solutions.
- There is a scarcity of available technical resources and subject matter expertise in the sector. What resources are invested tend to concentrate in large capital projects, which are hardware heavy and use of outside consulting. Human capital development of a cadre of technical professionals with knowledge of the core business has not been the pattern.

The experience to date would indicate that the nonprofit sector is an enthusiastic consumer of open source solutions that have been developed for the private sector. Conversely, this experience would suggest that the nonprofit sector has in general not been effective at developing and supporting these applications.<sup>6</sup>

### 3. OSP Short Term Technical Objectives

In keeping with the framework suggested above, two sets of technical objectives will be set forth below for the OSP: open source software and open design.

- Software: OSP will become the knowledge broker in identifying relevant mainline open source software for use in philanthropy and in adapting it for the field. It will also inventory nonprofit specific project candidates for evaluation.
- Design: OSP will catalyze resources and facilitate the development of requirement frameworks that will guide the adaptation of mainline products and enhancement of current platforms.

#### ***A. Objective 1: Building an Open Design Community Portal***

The first order of business will be to implement a set of tools (experimentation) to build a collaborative community of interested parties. This portal will include the OSP blog, project specific wiki spaces, a juried repository of requirement documents, and interaction with multiple back end databases tracking tools and their use by member organizations. Examples of implementation include:

- ✓ Building an information sharing portal for foundation IT profiles, including use of platforms, staff, customizations, etc.
- ✓ Building a community of interested parties to address the pressing issue of community knowledge assessment and measurement.

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<sup>6</sup> A successful exception to this rule is the [Gateway](#) in the Appendix. An example of a less successful initiative is the Nonprofit Open Source Initiative, see <http://www.nosi.net/>.



### ***B. Objective 2: Building an Online Community Version 2.0***

Leveraging Web 2.0 technologies in the service of philanthropy is the very essence of OSP. In our research with individual foundations, the need to engage donors is a recurring theme. This road leads to a desire to enable donors and grantees to engage each other directly. The prospect of mediating the exchange of ideas and resources using the techniques of peer networking and power of modern databases is irresistible.

But the challenges building this community faces are not trivial. Assuming a platform is in place, these challenges include gaining critical mass, gaining online literacy by nonprofits, integrating cool web based systems that still have their own "silo" issues, and managing security in an environment that promotes openness yet promises financial transactions.

This objective will identify out-of-the-box applications that can be combined to build a communications infrastructure that will support this community. It will demonstrate cosmetic integration of the tools, and insure that all selected components are able to share a unified authentication system. This system will build on experience gained in the OSP Design Portal. Most importantly, it will leverage the power of existing applications designed for general use.

The process of assembling the tools for this community will make use of the philanthropy design portal developed under objective 1. Early adopter partners will be required for implementation.

## **4. OSP Long Term Technical Objectives**

The longer term objectives for OSP will be the result of a dynamic interaction between the OSP Design community, project sponsors, critical thought leadership and industry wide trends. This paints a fluid environment, but in no way dilutes the drivers behind the OSP initiative: Knowledge networking, Social capital marketplaces, and Multi-sector solutions.

The fountain of projects that emerge from these drivers is staggering – a reality that is at once exciting and sobering. Only a collaborative environment will provide the joint forum needed to share understanding yet bandwidth needed to address all aspects of the projects. These issues include the building of human technical capital, collaborative project sponsorship, back end integration and self service.

## **5. Conclusions**

OSP is positioned to become the knowledge broker and resource catalyst in building the philanthropic knowledge network. It will use the very tools it promotes to find what works, (and what doesn't), and to promote the community ownership of intellectual property. It will provide the critical mass for specialized applications for the field, including an emerging social capital marketplace. Its emphasis on transparency will foster reaching across sectors to build a living and growing community of philanthropy.



## II. Appendix: Resources

### 1. Open Source: Protected Philanthropy

January 18, 2004 at 12:40 pm by Robert Adkins

<http://www.technetra.com/writings/archive/2004/01/18/open-source-protected-philanthropy> First published January 2004 in LinuxForYou magazine (www.linuxforu.com).

### 2. Development Gateway:

<http://home.developmentgateway.org/aboutus/keyDocs.do>

#### **A. Key Documents**

[2005 Annual Report](#)

[2005 Independent Evaluation of the Development Gateway Foundation](#)

[General DG Fact Sheet](#)

[dgMarket](#)

[Country Gateways](#)

[dgCommunities](#)

#### **B. Recent Example: Open Educational Resources**

<http://topics.developmentgateway.org/openeducation>

TUNIS – A new Web initiative launched today at the World Summit on the Information Society (WSIS), will connect anyone with Internet access and the desire to learn to a world of free, high-quality open educational materials.

The portal features free course materials and other educational content offered by the Massachusetts Institute of Technology, the Johns Hopkins School of Public Health, Chinese Open Resources for Education and other institutions around the world. The initiative is launched in partnership by the Development Gateway Foundation and the William and Flora Hewlett Foundation.

#### **C. Open Source: Local Projects Database**

<http://sourceforge.net/projects/lpd>

The Local Projects Database (LPD) is a web-based tool for managing records on development assistance activities financed and/or implemented by development partners. This java based application, allows inserting, maintaining and exchanging activity data.

#### **D. Open Source: Global List**

This page is cataloging links to useful web resources about efforts promoting the development of open source and free software. Please

<http://topics.developmentgateway.org/ict/rc/BrowseContent.do~source=RCContentUser~folderId=3079?source=RCContentUser&folderId=3079>



### 3. Interesting Products:

#### **A. Open Source Business Intelligence**

<http://www.pentaho.com/>

#### **B. Philanthropy Australia**

<http://www.philanthropy.org.au/>

#### **C. Internal Capacity Building for Small Foundations**

<http://www.tpi.org/downloads/pdfs/casey-internalfdncb.pdf>

Article: Building to Grow: Internal Capacity Building for Small Foundations Thomas E. Backer, PhD, *Human Interaction Research Institute* September

#### **D. The Center for Open and Sustainable Learning**

<http://cosl.usu.edu/> ; <http://cosl.usu.edu/projects>

[http://cosl.usu.edu/projects/start-an-ocw/intellectual-property-for-opencourseware/index\\_html](http://cosl.usu.edu/projects/start-an-ocw/intellectual-property-for-opencourseware/index_html) - Intellectual Property for OCW

At the Center for Open and Sustainable Learning, we believe that all humans beings are endowed with a capacity to learn, improve, and progress. Therefore, free and open access to educational opportunity is a basic human right

#### **E. CivicSpace: Engage Your Supporters Online**

<http://civicspacelabs.org/>

The CivicSpace On Demand service provides any individual a simple, web-based solution to the problem of bringing individuals and groups together on the internet.

Not ready for prime time and dependent on a CMS system

#### **F. CiviCRM: A Free and Open Source eCRM Solution**

<http://civicrm.org/aboutcivicrm>

<http://wiki.civicrm.org/confluence/display/CRM/Requirements+-+ACTIVE+Discussion+and+Revision>

CiviCRM is the first open source and freely downloadable constituent relationship management solution. CiviCRM is web-based, open source, internationalized, and designed specifically to meet the needs of advocacy, non-profit and non-governmental groups. (Better)

#### **G. Open For Business Project**

<http://incubator.apache.org/ofbiz/>

The Open For Business Project is an open source enterprise automation software project

#### **H. Web-Crossing: Community Platform Re-seller**

<http://www.webcrossing.com/Home/index.htm>

#### **I. Philanthropic Capacity Building Resource (PCBR) Database**

<http://www.humaninteract.org/reports/pcbrdatabase.asp> . This section of PCBR contains profiles of capacity-building activities conducted by intermediary organizations.