

CODEPLEX FOUNDATION

**PROJECT ACCEPTANCE AND OPERATION
GUIDELINES**

Contents

Mission.....	3
Vision.....	3
Principles.....	3
Community Viability:	4
Commercial Friendly:	5
Organizational Structure.....	5
Gallery Creation Checklist.....	6
On Going Gallery Activities.....	6
How a Project Joins the Foundation.....	7
Why a Project would Decide to Join the Foundation.....	7
Project Acceptance Checklist.....	7
How an Individual Becomes a Committer.....	8
Committer Acceptance Checklist.....	8
Next Steps.....	8

Mission

Enabling the exchange of code and understanding among software companies and open source communities.

Vision

Our vision is to create a respected institution comprised of a breadth of projects that span technology and maturity. Modeled after the great museums of the world, we will organize our projects into Galleries focused on specific areas of interest. The Foundation will provide central services and governance to the Galleries and the projects contained within them.

We envision a safe and vibrant community of individual contributors, corporate sponsors and project adopters. The Foundation will reach out to these different constituents to meet their needs and build bridges of communication between the different groups. We picture individual contributors bringing projects to the foundation, and joining existing projects because they feel confident that Foundation will support their efforts without imposing unnecessary restrictions on their work. Corporate sponsors will be attracted by the innovative gallery sponsorship model, but will ultimately stay engaged with the foundation because of the strong association with other corporate sponsors and the ease of interaction between corporations and open source developers on projects. We expect that projects associated with the Foundation will increase their user base, people and companies who adopt their projects, through increased exposure and an added sense of security that users will feel when downloading a foundation project.

In our minds, the reality of the CodePlex Foundation is that it will need to continually evolve to meet the needs of a constantly changing technical world. We will adopt a flexible model that enables us to learn from our mistakes and success and strive to improve each day. We expect that all of our constituents, the contributor, sponsor and adopter will willingly participate in this journey and assist by sharing their critical feedback, practical suggestions and occasionally a pat on the back for a job well done.

Principles

To successfully achieve our mission the CodePlex Foundation will need to attract and foster vibrant communities of open source projects and contributors. Our principles are designed around two themes - community viability and commercially friendly.

As we all know, it takes more than great code to have a successful open source project. It takes a team of dedicated individuals working together to build and

maintain a successful open source project. Our community viability principle is focused on ensuring a culture that will attract these dedicated individuals, advance their projects and encourage their personal development.

Building a commercially friendly open source foundation is a requirement to ensure maximum adoption of projects, enlarging the ecosystem for open source software and creating sponsorship and/or partnership opportunities between open source software and commercial entities. Our commercially friendly principles help us create a forum for open source communities and commercial companies to interact in a positive and collaborative manner.

Community Viability:

- **Smart People Need Flexibility** to do their Best Work. People who work on Open Source Projects are smart and need to have the flexibility to innovate and adapt over time. We will work to keep the absolute requirements for a project to a minimum while providing key resources (marketing, security, best practice repository, etc.).
- **Strong Project Team.** All projects accepted by the foundation will need at least 3 project committers and 1 team member designated as the prime source of contact with the foundation.
- **Everyone can use a mentor.** Learning from existing open source foundations seems to indicate the best way to infuse the foundation culture throughout new projects is through mentorship. So each project will have a mentor assigned from the board of directors or board of advisors. In addition to a mentor, each project will need to be adopted and fostered by a specific Gallery within the foundation. Projects with experienced leadership may be asked to serve as mentors for other projects as well.
- **Users deserve choice.** The foundation will allow new projects to join even if they have overlapping functionality with existing projects. Much like there are many different landscape paintings in museums which appeal to different visitors, we know that software users also have preferences. For example, a user might choose one blog engine over another because of a larger set of themes, regardless of the core technology decision (e.g. ASP.NET, PHP or JSP). Note: we also refer back to the “Smart People Need Flexibility” principle and we are trusting that people who work in OSS will do the best to review existing projects and merge into them when appropriate.
- **Continual improvement through sharing of best practices.** We are a new Foundation with a unique mission and we recognize the need to continually learn and evolve from our successes and mistakes. Project best

practices will be maintained by the central foundation and will be facilitated through post mortems of all projects after major releases or upon termination of a project.

Commercial Friendly:

- **Open Source Licenses.** The Foundation will maintain a list of recommended Open Source licenses for projects and maintain information necessary to understand how code can be shared between projects with the purpose of avoiding unexpected restrictions in how the final code can be used or redistributed. This includes maintaining information that makes clear how projects can incorporate external code. It should be possible, for example, for a project to incorporate appropriately licensed code without requiring a formal contribution of that code.
- **Secure Code and Vulnerability Response Plan.** Security conscience code and response time is the key to building trust with customers. The foundation will provide a central communications resource to projects for security escalation. These may take the form of externally found and reported vulnerabilities to escalations from within project teams. This central resource (likely comprised of a Technical Program Manager and volunteers) will also maintain a security blog that will be used to notify project adopters of important vulnerabilities and patches. This team will also create best practice documents (e.g. threat models) that may be used by project teams during development.
- **Commercial Sponsorship of Galleries.** To truly be commercial friendly, we must provide a way for companies to get involved with projects and sponsor work that directly addresses their specific needs while still abiding by the Foundation principles. To facilitate this interaction, the Foundation will enable Companies to sponsor galleries of projects within the foundation. In order for a company to sponsor a Gallery it must submit an application, make a donation to cover the central foundation infrastructure, and receive a majority vote by the board of directors.

Organizational Structure

The Foundation is divided into Offices and Galleries. Galleries are collections of projects and offices keep the foundation running and centralize services required by all of the galleries.

The Offices will rely on Foundation staff and volunteers to provide the centralized services. The initial Offices for the Foundation will be Administration, Marketing, Security and Best Practices. Each Office will have a designated contact and a set of services that they provide to the organization. New Offices can be created at the Foundation by the Board of Directors.

A Gallery can be run directly by the foundation or sponsored by a 3rd party, typically a corporation. Each Gallery will have a designated Gallery Manager appointed by the sponsor for that Gallery. A Technical Program Manager and a Mentor is also assigned from the Foundation. A Gallery is created when an application is submitted and approved by the Board of Director's vote. Galleries sponsored by 3rd party entities will be accompanied by a donation and a 3 year commitment to the Gallery.

Gallery Creation Checklist

- Gallery Creation Application Form Submitted to Foundation
- Minimum sponsorship commitment for 3 years
- Gallery Manager on board (appointed by sponsor)
- Technical Program Manager (assigned by Foundation)
- At least 1 project ready for the gallery
- Mentor Assigned from Board of Directors or Advisors
- Majority Board of Directors Vote to Create Gallery
- After 3 years Gallery progress reviewed and board with vote to extend for another 3 years or move projects "to storage"
- Note: A few Galleries will be operated directly by the Foundation Board of Directors and will not have external sponsors. These are created by the board in cases where a Commercial Sponsor may not be available but the area or related projects are deemed of strategic interest to the board. These Galleries will have the same requirements except for sponsorship.

On Going Gallery Activities

- Gallery Manager & Technical Program Manager recruit and review new project submissions
- Monitor and encourage projects within the Gallery.
- Select projects for inclusion in Gallery and recommend them to the Foundation
- After 3 years Gallery progress is reviewed.
- Commercial sponsor will decide if they will continue to sponsor the Gallery.
 - Board of Directors will vote to extend Gallery for another 3 years.
 - If the Gallery won't be extended the projects can be moved to other "willing" Galleries, or dormant projects can be moved "to storage"

How a Project Joins the Foundation

Each project in the Foundation will belong to a Gallery. Individuals or Corporations who want to donate a project to the Foundation must find a Gallery who is willing to accept them. Criteria for projects being accepted into individual Galleries will be determined by each Gallery however to ensure consistency the Foundation does make the following required of all projects joining the Foundation.

Why a Project would Decide to Join the Foundation

We understand that choosing to join the Foundation will be a big decision for open source communities and the projects that they represent. All projects that join the Foundation will benefit from the shared resources available to projects. The Foundation will build a collection of best practices from all of the participating projects and there will be a specific emphasis on security. In addition to security best practices, the Foundation will provide a central communication channel for security vulnerabilities that are reported as well as for the availability of security patches. The Foundation will also provide administrative and infrastructure support to projects and their communities. It is easy to see how projects would benefit from centralized marketing resources (e.g. assistance with messaging or conference participation).

Anchor projects, large established projects, may benefit from participation through increased adoption of their projects. Large corporations who are familiar with the Foundation may be more inclined to adopt or participate in projects that are part of the Foundation. The Foundation also provides a model for Anchor projects to nurture new projects within the same Gallery. Anchor projects can benefit by building a strong ecosystem for their projects to provide more end-to-end solutions for their adopters.

New projects that join the Foundation may benefit through increased opportunity for mentorship and sponsorship from their Gallery. In addition, new projects may find it easier to build their reputation and earn more credibility through association with the Foundation.

Project Acceptance Checklist

- Project Acceptance Application Submitted to Gallery Manager
- 3 Committers (Signed Contributor License Agreements)
- 1 Committer designated as the key contact for the foundation
- Pass Project Viability Test (at least one of the following must be true)
 - 2-3 Major project releases

- List of key adopters (e.g. if the Olympics are using version 1 they would still qualify)
- 3 Year Resource Commitment from a Commercial Sponsor
- Accepted by a Gallery (each Gallery can determine their own process) Note: Individual galleries may have additional acceptance criteria
- Gallery recommends Project to the Foundation
- Foundation board of directors votes (simple majority) to accept the Project.
- Project Mentor selected or Technical Program Manager Assigned

How an Individual Becomes a Committer

As we all know the heart of all open source projects is its committers, the developers who volunteer their time tirelessly building new features, fixing bugs, and answering questions. Aligning with our core principle of minimum requirements, each Project will determine who will be a committer for their projects. Once a project has determined that they would like to enable a new committer, the Project Contact will make sure that all of the necessary contributor agreements have been signed and returned to the Foundation prior to granting write access to the source code tree.

Committer Acceptance Checklist

- Each Project will determine who they want to have committer privileges for their project. (Note: Some Galleries might have specific committer rules)
- The single point of contact for the project will contact make sure that the new committer files all of the necessary legal paperwork (e.g. Contributor License agreement) with the foundation.
- Then and only then will the project grant the committer write access to the code.
- Projects are also self-empowered to remove people as committers from their projects.
- Best Practice Recommendation: All projects should clearly state what their criteria are for accepting committers and the expectations for someone to continue to be a committer on their project website.

Next Steps

This document can't have a conclusion section since our work as the Foundation is just beginning and we have a long way to go to achieve our mission. The next step

in our journey is to ask you, the potential open source developer, sponsor and adopter for your thoughts. What is missing from this document? What should be removed? What is unclear? Now is the time to tell us your thoughts, send comments to <mailto:discuss@codeplex.org> or get involved in a group discussion at <http://groups.google.com/group/codeplex-foundation> and help shape the CodePlex Foundation.