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DECEMBER 2009

### REFERENCES

- [1] SAKAI DEVELOPMENT PROCESS:  
[HTTP://TINYURL.COM/SAKAIDEVPROCESS](http://tinyurl.com/SakaiDevProcess)
- [2] SAKAI PRODUCT COUNCIL:  
[HTTP://TINYURL.COM/SAKAIPRODCOUNCIL](http://tinyurl.com/SakaiProdCouncil)
- [3] SAKAI 2.7 RELEASE:  
[HTTP://TINYURL.COM/SAKAI2DOT7CHANGES](http://tinyurl.com/Sakai2dot7Changes)
- [4] PLANET SAKAI:  
[HTTP://WWW.PLANETSAKAI.ORG](http://www.planetsakai.org)
- [5] SAKAI FOUNDATION BLOG:  
[HTTP://SAKAIPROJECT.ORG/BLOG](http://sakaiproject.org/blog)



## LETTER FROM THE EXECUTIVE DIRECTOR

December 22, 2009 – There have been a number of exciting developments in the Sakai Community focusing on improving the Sakai Product Development process and continuing design and development of Sakai 3. Although there is always more work to be done, I'm happy to report substantial progress has been made on both fronts in the five months since the incredibly successful 10th Annual Sakai Conference in Cambridge Massachusetts.

The new [Sakai Development Process](#)<sup>[1]</sup> got underway with the formation of the [Sakai Product Council](#)<sup>[2]</sup> and the hiring of Clay Fenslon as Sakai Product Manager. This group is working with the community to increase the predictability of the Sakai roadmap as well as the coherence and quality of the product. Recently, the Product Council decided which new capabilities would be part of the [Sakai 2.7](#)<sup>[3]</sup> release, and more importantly helped shape some of those capabilities to better meet community needs.

On the Sakai 3 front it has been all about user research and design. A group of organizations (Cambridge, Georgia Tech, HEC Montreal, Charles Sturt and the Sakai Foundation) are working with a consultant to create designs that the developers can implement. And the community is collaborating on documenting user requirements that are feeding this design process. The best way to follow what's happening is to track either [Planet Sakai](#)<sup>[4]</sup> (the Sakai community blog) or the [Sakai Foundation blog](#)<sup>[5]</sup> (postings from Sakai staff members that also appear on Planet Sakai).

There's a lot more happening, of course, and the rest of this Executive Brief will call out more of the highlights. We hope you find this communication vehicle helpful and we'd appreciate your feedback.

A handwritten signature in black ink that reads "Michael J. Korcуска".

Michael Korcуска  
Executive Director  
Sakai Foundation

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## THE SAKAI COMMUNITY

### Sustainable, Global and Diverse

The Sakai Community comprises a diverse set of institutions. Larger institutions predominate and are attracted by Sakai's reliability and scalability. However, smaller schools, four-year colleges, junior colleges, and even secondary education schools are also using Sakai. It is a testament to Sakai's functional breadth and flexibility that it can meet the pedagogical and research needs of such a broad spectrum of schools.

### Migrations

There are an increasing number of institutions considering Sakai as an alternative to an existing LMS. Although the economics of an open source solution are attractive, in most cases cost is not the overriding factor. The sustainable collaborative development model for Sakai reflected in our tag-line "built by educators, for educators", and the close alignment of the project's goals and features with the higher education community's needs are what make the case. Our community-source development model is based upon the belief that innovation and product priorities should be owned and guided as directly as possible by the educational institutions using Sakai. Hence, most of the direct design and development work are, intentionally, conducted by members of the larger Sakai community.

In many cases the consideration for a change in LMS systems is precipitated by disruptions caused by upgrade migrations mandated by the current vendor. If one is forced to endure migration costs in any case there is an opportunity to use the disruption to move to a better solution. At the EDUCAUSE conference in November 2009 the Point/Counterpoint panel session "Sakai, Blackboard, and Moodle" generated such interest that a satellite room had to be opened with a video feed to accommodate the overflow crowd.

As more and more institutions make the transition to Sakai, the community is building the experience, expertise, and tools to ease burden of migrating course content to Sakai.

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## THE 11TH SAKAI CONFERENCE

The global Sakai community will meet in Denver in 2010.

**Pre-conference Sessions:**

- June 14th

**Conference Sessions:**

- June 15th – June 17th

Information on the **11th Sakai Conference** is available at the Sakai website:

<http://sakaiproject.org/annual-conference>



### Strength in Numbers

The 10th Sakai Conference held in July 2009 had the highest attendance to date, and 35% of the 500+ participants were first-time attendees. About one-third of the participants were faculty, staff, or instructional designers - those who use Sakai every day to help do their job. We recorded video interviews from attendees about choosing and using Sakai. These testimonials can be seen on [SakaiVideos on Vimeo](#) and throughout the newly refurbished Sakai website [sakaiproject.org](http://sakaiproject.org).

Sakai is used around the world. Many attending the conference came from outside the US including the first prize winner of the 2009 Teaching With Sakai Innovation Award, Dr. Andrea Crampton at Charles Sturt University, Australia.

In 2010 the Sakai Conference will be in Denver, Colorado, June 15-17, so mark your calendars.

### Designing for the Future

A consensus was reached during the Annual Conference that the best strategy for early benefits and a smooth transition from Sakai 2 to Sakai 3 was to create a hybrid-mode that will enable institutions to begin using Sakai 3 features along with older Sakai tools. Developers at Georgia Tech and Cambridge University, and others in our international community, are working together to create an integration of both Sakai 2 and Sakai 3, and share functionality between them, providing a Sakai 3 portal user interface to expose Sakai 2 sites and tools.

The Sakai 2+3 Hybrid instance will use Sakai 3's portal as the controlling user interface and authentication for both Sakai 3 and Sakai 2 sites. Unlike abrupt disruptive transitions and software upgrades in other products, the benefits of Sakai 3 can gradually be added to an existing Sakai 2 deployment. You can see a [proof-of-concept demo](#) on our website.

*"Ultimately, [the committee] decided that the power and flexibility of Sakai, coupled with the advantages of the open source model and the Sakai community, best met the needs of UF as envisioned in our strategic academic and IT plans."* - University of Florida, adopted Sakai 2009

*"Modules and contributions to Sakai typically come from within colleges and universities. These groups are looking to solve real-world problems and to be responsive to the particular needs of faculty and students... The goals of higher education align well with open source alternatives. With its more intuitive interface and toolset, Sakai will present a lower learning curve for new users and require less support than Blackboard."* - [University of North Carolina, Sakai Pilot Evaluation Final Report, 2009](#)

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### SUPPORTING THE SAKAI COMMUNITY

#### Foundation staff provide the following:

- Hosting the development infrastructure, wiki and mailing lists.
- Organizing the annual international Sakai conference.
- Creating the official Sakai product releases and documentation.
- Coordinating the Sakai Product Roadmap and the QA process.
- Providing news, communication and tutorials that document the Sakai software, community activities and best practices.
- Coordinating and funding the Sakai Fellows program.
- Coordinating the annual Teaching With Sakai Innovation Awards.
- Working with standards organizations to ensure the standards meet community needs.
- Speaking about Sakai at industry conferences.



## SAKAI FOUNDATION STAFF ACTIVITIES

The Foundation staff provide the necessary continuity, infrastructure, and support to coordinate the distributed worldwide software development and collaboration activities in the Sakai community.

### Product Manager: Clay Fenlason

Kicking off the new role of Product Manager in August 2009, Clay's major activities include establishing the [Product Council](#), implementing the new release process, and facilitating Product Council decisions for the upcoming Sakai 2.7 release. He has helped draw new projects into incubation, with emphasis on the emerging Sakai 3 platform. He is coordinating the [design project for Sakai 3](#) and plans to help usher the new design through community review and eventually to completion in 2010.

### Developer Support, Release Management & System Administration: Anthony Whyte

Anthony managed releases for Sakai 2.6.0-2.6.2 and the corresponding 2.5.x version updates. He is engaged in release and branch management work with the upcoming Sakai 2.7.0 release and a number of independent releases accompanying it. He formed the new Sakai [Maintenance Team](#) to better address issues in the Sakai code base and provide a mechanism so institutions can reclaim some of their development resources after the delivery of production-ready code.

Anthony and others have been chipping away at our traditional monolithic release process by repackaging a number of projects and related services and releasing them independently. The goal is to streamline our dependency tree, give project teams greater control over all aspects of the development process, and shorten the time it takes for fixes and new features by having independent releases. You can read more about the current release process in his Sakai [blog post](#).

### Scholarly Technologist: Lance Speelmon

Lance has joined the Sakai Foundation staff through the end of 2010 on loan from Indiana University. He will initially focus on leading the community in the development of a Sakai 2-to-Sakai 3 migration strategy. He has lead early work including a video demo on implementing a Sakai2+3 hybrid showing how Sakai 2 tools can be used via portlets in the Sakai 3 user interface. He has also been working on archiving Sakai 2 sites so they can be migrated to Sakai 3 and on developer documentation for Sakai 3.

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### QUALITY ASSURANCE IN SAKAI

The role of QA is not just about removing defects, but also supporting decision makers in judging risks and test management – and for others to reuse tests locally and view historical progress. We should promote a continuous builds environment (not just one build for trunk) with the continuous builds having its own branch-like manager. We should look at adding automatic stress and functional testing as part of the continuous build process, only if the cost of implementation is paid back by active use. There is no point in building infrastructure that does not support decision makers or generate a clear set of to-do's for developers that they then enact.

- Alan Berg, Interim QA Director



#### Communications Manager: Pieter Hartsook

Pieter manages the internal and external communications for the Sakai Foundation. He oversaw a major redesign and implementation of the Sakai project website to enrich the user experience. This included adding video interviews with Sakai users, a [News and Events overview page](#), calendars, a Sakai Project group blog for project leaders, multiple RSS feeds, a Twitter-roll for a display of Sakai-related Tweets by the active Sakai Twitter community, and the inclusion of a searchable version of the Sakai mail lists. Pieter also administers all the Sakai mail lists, the project wiki, Sakai groups on LinkedIn and Facebook. In addition to on-line communications he has been working on information packets for the Foundation membership drive and assisting Foundation Board and Staff with announcements, published articles, and press releases.

#### Interim Quality Assurance Director: Alan Berg

Alan, a Sakai Foundation Fellow in 2008, is currently assisting with the Sakai 2.7.0 release process (2.7.0 is scheduled for Q2 2010) and helping redefine the overall Sakai Quality Assurance process. He has set up a basic continuous build server and proposed technology change recommendations especially targeting test automation. He has collected local QA resources from the community and developed a simple QA test management website backed onto subversion. To improve non-technological processes he has started pushing automated weekly status reports, has written detailed recommendations and a QA action plan. The [Sakai QA Working Group](#) wiki space has information and links to these documents.

#### Administrative & Conference Coordinator: Mary Miles

Mary provides administrative support for all the Foundation activities including organizing the annual international Sakai Conferences. Recently this has included coordination for the Board of Directors elections and regular Board meetings, preliminary organization for 11th Annual Sakai Conference in Denver - July 2010, and ongoing Foundation accounting oversight.

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## THE SAKAI PRODUCT

## Sakai Release 2.7

There has been considerable work done toward the next feature release of Sakai scheduled for Q2 of 2010. In addition to feature enhancements and bug fixes across the existing set of tools and services, four substantial new capabilities are being introduced:

- [SiteStats](#), a very popular contrib tool, is moving to the core distribution.
- [Profile 2](#), a new user profile with social networking features, will become the default profile tool.
- [Conditional Release](#), the ability to release resources based on events in the Gradebook, will be included in 2.7 (although off by default).
- 2.7 will also include an implementation of the [IMS Basic Learning Tools Interoperability](#) standard, allowing Sakai to be both an LTI producer and consumer.

These four capabilities were all part of the new Sakai development process and were vetted by the Sakai Product Council. You can see their [comments](#) on all the projects that were considered for 2.7 on the Sakai wiki.

## Sakai 2 Maintenance Releases

While work on new features goes forward, there is also continuing work fixing problems reported in the current codebase. The following Sakai maintenance releases have been made since the Boston Conference in July 2009:

- July 2009: Sakai 2.5.5. This coincided with the 2.6.0 release and fixed several security issues that were also addressed in 2.6.0 (requiring a simultaneous release).
- October 2009: Sakai 2.6.1 (with Kernel 1.0.12). This maintenance release provided a set of bug fixes, language/locale updates and performance enhancements that improve upon the Sakai 2.6.0 release. Over 200 issues were addressed by 2.6.1.
- December 2009: Sakai 2.6.2 (with Kernel 1.0.13) and Sakai 2.5.6 are both scheduled for this month. For more information on what is included, visit the release pages on the wiki.

## Sakai Maintenance Team

The Sakai Foundation has established a Sakai maintenance team -- a group of individuals with institutional support who will be available on a regular basis to address the maintenance of code in the core Sakai release. This team's efforts will be centrally managed, initially by Sakai staff member Anthony Whyte.

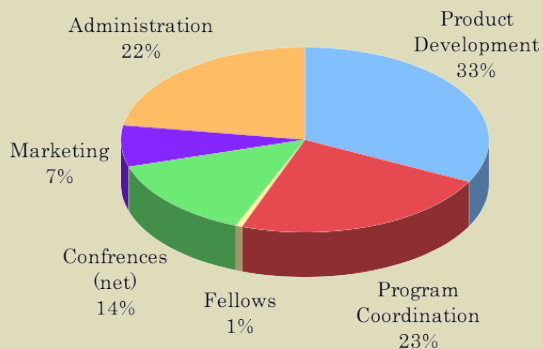
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## SAKAI FOUNDATION EXPENSES

The Foundation staff provide the necessary continuity, infrastructure, and support to coordinate the distributed worldwide software development and collaboration activities in the Sakai community.

### Foundation Estimated Expenditures 2009



There are a variety of goals for the Maintenance Team, including:

- Ensuring maintainers exist for areas of code which no longer have active development teams.
- Increasing code reviews, automated testing, documentation and programming best practices.
- Permitting institutions to reclaim development resources after delivery of production-ready code by ensuring ongoing support for their finished work.
- Providing cross-institutional mentoring opportunities for new contributors to learn and become active in the developer community.

Anthony wrote about forming the team on his [blog](#) and we are eager to recruit even more participants. It doesn't require a full-time commitment and is a great way to make a contribution to the community that will pay dividends for your institution as well. [Contact Anthony](#) for more information.

### Progress on Sakai 3

We have made significant progress in the design and implementation for Sakai 3, although there is a substantial need for additional resources. Sakai Product Manager Clay Fenlason has been leading a design effort sponsored by Cambridge, Georgia Tech, HEC Montreal, Charles Sturt and the Sakai Foundation. Meanwhile, implementation both the back-end and front-end basic collaboration infrastructure continues. Lance Speelman is leading efforts to establish a migration path from Sakai 2 to Sakai 3. And the community has been participating in user research and requirements documentation that is being directly incorporated into the design work.

Here are a few places to learn more:

- Clay Fenlason's [Product Management blog](#) has interesting updates about the Sakai 3 design work.
- A demo server is available at [3akai.sakaiproject.org/dev](http://3akai.sakaiproject.org/dev). You're welcome to create an account and look around, but be warned this is software in development.
- Lance [created a screencast](#) showing a proof-of-concept for "Hybrid Mode" Sakai 2 and Sakai 3.
- The teaching and learning community created a [Learning Activities Worksheet](#) capturing functional needs Sakai 3 should address. While difficult to understand out of context, there is vibrant activity on list. Stanford University has been leading user research to inform a redesign of Tests & Quizzes and a group of institutions interested in library integration have also [conducted valuable user research](#).

All of this adds up to sea change in how Sakai 3 is being developed. User research, functional leadership and user experience design are being emphasized and leading the development work. All this bodes very well as Sakai 3 moves forward.

We do need more resources to accelerate progress on Sakai 3. If you have designers and developers who can participate, that's great, [contact us](#) and let us know. If you can provide financial assistance write us [contributions@sakaifoundation.org](mailto:contributions@sakaifoundation.org). We've established a special fund to support the Sakai 3 effort.

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COMMERCIAL AFFILIATE PROGRAM

**Commercial Support Services**

Many institutions and organizations who adopt Sakai take advantage of the expertise resident in a growing number of commercial enterprises specializing in providing Sakai hosting, consulting, installation, integration and support services.

Information on these companies' services is available on the Sakai website:

<http://sakaiproject.org/commercial-support>



**SAKAI COMMERCIAL AFFILIATES**

The Commercial Affiliates are an important and integral part of the Sakai ecosystem. Companies become members of the Sakai Foundation Commercial Affiliate Program to support the work of the Foundation, the development of Sakai, and directly contribute to open source technological innovation for higher education.

These companies provide financial support for Foundation functions and special projects, contribute to the design and development of the codebase, and offer hosting, commercial installation, and technical support and training services for their client institutions. We want to recognize their important contribution to the Sakai community and to thank them for their participation.

