Apereo Foundation Annual Report

Presented at the Apereo Foundation's Annual General Meeting, July 26th, 2023
Welcome

I am thrilled to present to you our organization's Annual Report for 2022. As the Executive Director, it is both an honor and a privilege to share with you the remarkable impact we have achieved over the past year, thanks to each of you through your unwavering dedication and support.

Apereo was founded to help educational organizations "foster, develop, and sustain open technologies and innovation to support learning, teaching, and research," making meaningful differences in how educational technology is developed and delivered through collaborative communities of practice while enhancing access to education and extending the opportunities in teaching and learning. This past year has been a testament to the power of collective action and the strength of our shared mission.

Throughout 2022, we have remained steadfast in our commitment to transition through new leadership and assess, and build upon, the Foundation's organizational capacity, operational effectiveness, and financial stability. It has been a year of challenges, but we have adapted, innovated, and thrived together.

In this Annual Report, you will find a comprehensive overview of the key milestones we have achieved in the past year. From impactful projects and transformative initiatives to heartwarming success stories, you will witness the direct influence of your support on the success of Apereo's projects, engagement across communities, and new opportunities for and in higher education.

Key highlights of this year's report include:

- Completion of Apereo Operational Review: This comprehensive study of Apereo’s current policies, procedures, and projects helped to identify areas for improvement and highlighted the Foundation's successes.
- Fiscal Sponsorship and Allocation Review: After an internal review, budget and accounting updates were identified, reallocating funds back to Apereo projects.

None of these achievements would have been possible without the tireless efforts of our dedicated team and the invaluable contributions of our volunteers, donors, and partners. Your belief in the benefits of open source software and its ability to extend and improve higher education propels Apereo and our community forward, overcoming obstacles and turning challenges into opportunities.

As we reflect on the past year, we also look to the future with great anticipation. The impact we have made is just the beginning, and we have ambitious goals for the years to come. Together, we will continue to expand our reach, scale our initiatives, and create a lasting legacy of positive change.

In closing, I extend my deepest gratitude to the Apereo Board of Directors for honoring me with an appointment as Apereo’s second Executive Director. Thank you to the broad Apereo community for your support as I navigated the community and learned the ropes. Your support has made an immeasurable difference, and I am excited to embark on this next chapter together.

With profound gratitude and warm regards,

Patrick Masson
Executive Director,
Apereo Foundation
Overview

The Apereo Foundation is a U.S. public charity with global scope serving the broad and diverse education sector. The core mission of Apereo is “to assist and facilitate educational organizations which collaborate to foster, develop, and sustain open technologies and innovation to support learning, teaching, and research.” Apereo strives to realize that mission through community-driven initiatives: serving as a home to open source software projects, cultivating peer networks of practice, and advocating for the adoption and participation in open resources.

Apereo:

- Serves as a fiscal sponsor providing member projects core technical infrastructure as well as centralized business, legal and administrative services.
- Promotes practical collaboration between educational organizations, the sharing of best practices, and dissemination of results of innovative approaches to applying open technology architectures and systems in an educational context
- Develops and sustains a global community of interest among educational institutions to advance open source software and open standards, technologies, architectures, systems, and content, promoting international collaboration in these areas
- Creates, through its various activities, including conferences, projects, and outreach, an atmosphere of trust, goodwill, and mutual respect among all participants
- Provides governance and infrastructure for the management of open source intellectual property to increase the sustainability of open source efforts as well as the legal security of both contributors and adopters.

As a mature, non-profit organization supported by an international partnership of thought-leaders, academic and research institutions, and edtech companies, member projects are free to focus on ideas, innovation, and implementation to grow projects and participation.

To complement and advance our member projects and the value of open source software and initiatives generally, Apereo invests significantly in awareness and advocacy efforts promoting the principles, practices, and potential of collaborative co-creation. Apereo's partners--a who's who of international academic and research institutions, government departments and ministries, educational consortia, professional associations, and technology corporations--provide advice and counsel on policy and, with gratitude, financial support to ensure Apereo's own sustainability.
By The Numbers

2198 Apereo community members: developers, students, systems & network administrators, faculty, librarians, instructional designers, campus staff, individual members, and corporate affiliates.

1206 Newsletter subscribers.

550 Code contributors to Apereo projects.

50 Organizational members: colleges & universities, educational consortia, government departments and ministries, and edtech companies.

12 member projects: Bedework, CAS, ELMS (HAXX), Karuta, OAE, OnTask, Opencast, openEQUELLA, Sakai, UniTime, Uportal, Xerte.

5 incubation projects: EDexchange, Fiosan, Image Quiz, Shuhari, Tsugi.

10 Community events and conferences: Open Apereo, Sakai Days, HAX Camp, Opencast Summit, SakaiCon, Opencast DACH, World Conference on Computers in Education, Sakai Virtual Conference, 2022 Media & Learning Association’s Annual Conference, Dutch Xerte Community Mini Conference.

6 Apereo staff and contractors.

$890,000 Net assets, end of year 2022.
Highlights

Apereo Foundation Fast Interviews Launch

Apereo Foundation Fast is an interview series giving a quick "behind the scenes" peek at Apereo's projects and people. As a community, Apereo is honored to include dedicated educational professionals working in various roles with a shared commitment to open source software. Their work is too exciting, and their accomplishments too significant not to share--no, celebrate. In 2022, we were honored to introduce Wilma Hodges, Community Manager, Sakai; Misagh Moayyed, Project Management Committee Chairman, CAS; Anne-Marie Scott, Board Chair, Apereo Foundation; Dr. Lucy Appert, Director Of Educational Technology, Faculty of Arts & Science, New York University; Olaf Schulte, Project Management Committee Chair, Opencast; Theresa Rowe, Treasurer, Apereo Foundation; Inge Donkervoort, Board Director, Apereo Foundation; and, Julianne Morgan, 2022 Apereo Fellow and Academic Engagement Lead, Learning and Teaching Center, University of Dayton.

Open Apereo 2022 - The Value of Open Source

Open Apereo 2022 explored the value of open source software and communities to address higher education's top IT issues, driving digital transformation, delivering technical innovation, fostering openness, and enhancing educational access and equity. Since 2020, EDUCAUSE's Top 10 IT Issues have focused on Digital Transformation (Dx) "to better meet campus needs by leveraging technology and data." Their report, The Road to Digital Transformation, includes incorporating open standards into enterprise IT to simplify integration and IT management and open educational resources (OER) to promote sustainability. Open source software—driven by standards and devoted to sustainability—is another valuable resource campuses can leverage to optimize the institution's operations, innovate in teaching and learning, and advance strategic initiatives, realizing the value and benefits of Dx. As Forrester puts it, "open source powers enterprise digital transformation," urging, "CIOs need to embrace open source software to drive change."

Open Apereo 2022 included keynote speakers in open source awareness and adoption from three significant constituents impacting higher education today:

**Danese Cooper, Chair, Chair of InnerSourceCommons.org**: Cooper has been an outspoken Free and Open Source Software activist for over 20 years. She has consistently promoted the health and welfare of the FOSS movement while working in roles including CTO of Wikipedia, Chief Open Source Evangelist for Sun Microsystems, Senior Director of Open Source Strategy for Intel, and as a Board Member with the Drupal Association, the Open Hardware Foundation, and the Open Source Initiative. While directing PayPal's OSPO, Cooper began thinking, talking, and writing about InnerSource as the logical next step to sustain the FOSS movement.
Stephen Jacobs, Director of Open@RIT and Professor, School of Interactive Games and Media, Rochester Institute of Technology: Jacobs is an interdisciplinary scholar working in Free and Open Source Software and Free Culture, Digital Humanities, Game Design and History, and Interactive Narrative. His research on Open Work is funded by The Ford Foundation, The Alfred P. Sloan Foundation, The UNICEF Foundation, The All Children Reading Grand Challenge, The Zero Project, The Linux Foundation, Red Hat Inc, Northern Telecom and AT&T. He received RIT’s Provost's Award for Excellence in Faculty Mentoring for 2019-2020.

James Stuart, CTO & Partner, Public Digital: Stuart is Public Digital's lead technology specialist, helping clients develop strategies and skills to support organizational transformation in IT. Stuart is a non-executive director in the UK Parliament and is a member of the Mayor of Hackney's Digital Advisory Council. Previously Mr. Stewart was Deputy CTO of the UK Government, responsible for building technology capacity across government and leading the adoption of public cloud, open standards, and open source. He was also deeply involved in forming the UK’s National Cyber Security Centre. James built and led the technical team operating GOV.UK and a range of other government platforms, ensuring that tech skills were an effective part of multi-disciplinary teams. He represented the UK government at the W3C and on Github's Customer Advisory Board.

Aper eo Awards Become Dolphin Awards

Each year, the Aper eo Foundation celebrates our open source community's volunteer efforts, innovations, and success stories. In 2022, the Aper eo community honored Executive Director Emeritus Ian Dolphin by naming the Aper eo Awards in his honor. The new Aper eo Foundation naming conventions recognize Dolphin's years of service, dedication to open source values, commitment to higher education, and extraordinary leadership. The various Aper eo awards have become the Aper eo Dolphin Awards & Fellowships. The Foundation also created a new leadership award – The I.A.N.–highlighting a community member's “Innovation” in evolving the Foundation, “Advocacy” for open source software in higher education, and “Networking” in building community. The inaugural Aper eo Dolphin Awards and Fellowships were announced at Open Aper eo 2022.

The Dolphin Award for Innovation, Advocacy, and Networking, "The IAN."

The IAN recognizes creative and visionary community members who promote and propel open source initiatives to meet higher education's diverse and evolving needs.

Jim Helwig, University of Wisconsin: Helwig’s record of leadership in the Aper eo community across several projects and initiatives was the primary reason for awarding him the inaugural IAN. Examples of Helwig’s service to the community include roles as a member of the Aper eo and Jasig Boards, holding multiple positions with, and making multiple contributions to, the uPortal Project including chairing the uPortal Steering Committee and serving on the Aper eo Financial Committee.
Dolphin Award for Teaching and Learning

This Dolphin Award recognizes innovation in teaching and learning using open source software, promoting excellent pedagogy, sharing new practices in education, and encouraging more faculty involvement in software evolution.

**Tobias Thelen, Universität Osnabrück:** Thelen was recognized for his continued efforts to improve educational technology in teaching and learning over the last ten years. Innovative flipped classrooms and his new "Open Source Software Development" course inspired students and colleagues to explore new modes of education and the software to deliver them. On a technical note, the Board wished to congratulate Thelen on his success in integrating open source tools for building online courses directly into the University's learning management system, an approach now used by several other universities.

Dolphin Fellows

Fellows are selected for their exceptional service and contributions to the Apereo community. Recipients' roles vary and include software development, project management, community engagement, and other areas supporting projects and people across the Foundation.

**Alan Regan, Pepperdine University:** Regan was recognized for his work with the Apereo and Sakai community for over ten years, including advocating for teachers and learners through user-driven development initiatives and broader foundation-wide contributions supporting the annual Open Apereo Conference.

**Carlos Ribalta, Universitat Politècnica de València:** Ribalta was awarded for his commitment to Apereo and the Opencast project, including technical contributions with the new Paella player and his collaboration across the community to ensure accessibility and usability are top of mind in design and development.

**Christopher Beach, Unicon, Inc.:** Beach’s commitment to Apereo spans open source software and community through advocacy of OpenEQUELLA, technical contributions to uPortal, and leadership as a steering committee member, committer, and release manager.

**Julianne Morgan, University of Dayton:** Morgan has contributed to Apereo and Sakai—often behind the scenes—by helping to define and drive improvements in Sakai. She is involved with the Sakai marketing team, outreach during Educause's ELI conference, and participation with SakaiCon.
Apereo Recruits Top Talent For Treasurer’s Role

After several years of leadership in various roles across Apereo, including Board Treasurer, Tim Carroll stepped down, leaving a significant gap in not only the Foundation’s financial operations but also organizational continuity. After a dedicated search, Apereo was pleased to announce Theresa Rowe would join Apereo as Board Treasure.

Theresa is an experienced Higher Ed Chief Information Officer and consultant. She is also an independent strategic IT consultant and leadership coach with expertise in strategic IT planning, leadership professional development, and building successful and strategic IT organizations. She received the Educause Community Leadership Award in 2014 and served as the coordinator for the Educause CIO Constituent Group from 2006 to 2015. She previously served on the board of Merit Network and joins the Foundation again after serving on the Apereo Board from 2013 through 2017, including as Board Chair.

Rowe was named a Top 30 Technologists, Transformers, & Trailblazers by the Center for Digital Education in 2015. She was named a 2017 Premier 100 Technology Leader by Computerworld. Leadership experience includes creating evergreen strategic plans, leading successful governance models, developing and executing network plans, upgrading data-center facilities, implementing ERP systems, and implementing open-source solutions. Rowe spent 28+ years at Oakland University before entering the consulting world full-time.

Apereo Welcomes Two New Board Members

**Wes Turner, Senior Lecturer, Rensselaer Polytechnic Institute**

Dr. Turner has been associated with open source software since 2001, when he joined GE Global Research in the Visualization and Computer Vision Group (VCV), developing open source tools, including the Visualization Toolkit (VTK) and the Insight Toolkit (ITK). Other GE open-source projects included virtual environments for industrial planning, cancer detection, lesion sizing, and even forensic facial reconstruction. After GE, Dr. Turner joined Kitware, a research-focused business dedicated to developing medical applications for cancer detection and characterization. Throughout his career, Dr. Turner has received multiple NIH grants supporting open source software projects related to biological research in genomics, proteomics, transcriptomics, and metabolomics.

In 2013 Dr. Turner led the U.S. Veterans Administration’s development of an open source Electronic Health Record as the Director of Open Source Operations, leading to the formation of OSEHRA. Dr. Turner joined Rensselaer Polytechnic Institute as a Senior Lecturer in 2016. In addition to his teaching and research, he serves as the Director of the Rensselaer Center for Open Source, which promotes open source use and development on campus and includes the annual participation of 350+ students, all contributing to open source software projects.
Clint Lalonde, Acting Director, Open Education, BCcampus

As an educational technologist and advocate for using open educational resources and open education practices in higher education, LaLonde is intensely interested in open source technologies and their broader use in higher education to support academic projects and initiatives. His experience includes working in multi-institutional collaboratives and non-profits.

Lalonde has worked in the British Columbia post-secondary system for 25 years and is currently with BCcampus, a non-profit provincial consortium providing leadership and support to twenty-five publicly funded post-secondary institutions in the province of British Columbia. BCcampus works with institutions on collaborative projects in open education, education technology, online and blended learning, and teaching & learning practices in higher education.

In his 10 years with BCcampus, Lalonde has worked on numerous multi-institutional collaborative open technology initiatives, administering open education project grants for the BC post-secondary system and managing development efforts to rebuild a provincial open textbook repository. Lalonde is also a founding member of the BC Open EdTech Collaborative, a network of post-secondary educators who provide open-source software support to post-secondary educators interested in using open-source technologies in their teaching and learning practices. He is also an Associate Professor in the School of Education & Technology program at Royal Roads University and an occasional Sessional Lecturer in the Department of Education at the University of Victoria.

In the past, Lalonde was the Manager of Learning Technologies in the Centre for Teaching & Technology at Royal Roads University. He worked at Camosun College, supporting faculty in developing distributed education courses and programs. In 2002, Lalonde attended the Application and Management of Information Technology (AMIT) program at the University of Victoria. He completed his Masters in Learning and Technology at Royal Roads University in 2011.
Operations

Operational Review

During Apereo's transition in leadership, an organizational review was undertaken to better understand, prepare, and strengthen the Foundation. The process was broad in scope; to collect, organize, analyze, interpret, understand, and share current procedures, practices, and policies to inform ongoing decision-making and validate future directions. The organizational review facilitates organizational success by developing insight and intelligence about the Foundation as a basis for assessment and improvement. There are 3 primary purposes for Apereo's organizational review:

**Strategic**: Provide critical insights to develop and launch new initiatives, identify objectives, and set priorities. Serves as a foundation for strategy development and implementation.

**Foundational**: Collect and analyze information about stakeholders, expectations, impacts, and other related information key to success in project and change management efforts.

**Improvement**: Identify areas and ways to improve organizational performance and results. Results often lead to improvements in processes, structure, skill development, revenue generation, and cost reduction initiatives.

The review included:

1. **Compliance and accountability**: Apereo, as a U.S. and New Jersey based corporation, is subject to various laws, regulations, and funding/reporting requirements. The 2022 internal review helped ensure the Foundation complied with these rules and regulations. It also informed and enhanced accountability by reviewing whether funds were (and are) used appropriately and in line with the organization's mission, a significant issue for non-profits serving as fiscal sponsors. Examples include addressing Apereo's GM vs. ED role and obligations, confirming contracting processes, identifying needs for fiscal sponsorship, and reallocating member project funds.

2. **Risk management**: The internal review helped identify potential risks within the organization's operations, finances, and governance. Understanding these risks identified proactive measures to mitigate them, reducing the likelihood of negative impacts on Apereo's programs, projects, members, and reputation. Examples include initiating a "Risk Registry," review of and alignment with the Foundation's bylaws (Treasurer's role and the Audit and Remuneration Committees), extended insurance coverage, and Conflict of Interest declarations.

3. **Efficiency and effectiveness**: Throughout 2022, Apereo evaluated the efficiency and effectiveness of its processes, financial management, and resource allocation. Identifying areas of inefficiency allowed the organization to make improvements and optimize operations. Examples include Iron Mountain and Rehmann's overages, insurance consolidation, procurement cards, travel and expense reimbursements, and extending internal capacity with CiviCRM, Zenifits, and HeliosVoting, migration efforts with the Apereo website, and Apereo's mailing and domicile addresses.
4. Donor and stakeholder confidence: Transparent financial reporting and successful internal reviews can increase donor and stakeholder confidence in Apereo’s operations. This, in turn, may lead to more substantial support and funding for the Foundation’s mission. Examples include project-level financial reporting and the 2022 internal review itself.

5. Governance improvement: The review also intended to shed light on potential weaknesses in Apereo’s governance structure, providing opportunities for improvement. Strong governance is crucial for effective decision-making and long-term sustainability. Examples include seating the Board Treasurer, charging a Finance Committee, and enabling electronic voting.

6. Fraud prevention: Due diligence through regular reviews helps detect fraudulent activities (not just internally), including misappropriation of funds, and discourages individuals within the organization from engaging in dishonest practices. Fortunately, and not unexpectedly, no incidences of fraud or dishonesty were discovered.

7. Continuous improvement: Understanding current operations not only allows Apereo to discover problems but also identifies areas where the Foundation excels. Understanding strengths and weaknesses allows Apereo to focus on continuous improvement and build upon its successes. Examples include the re-launch of the Incubation Working Group, online voting, contact/membership management, and communications efforts (web site, social media, newsletter).

Re-Lauch of Incubation Working Group

Apereo understands how critical sustainability is within open source. Adoptors need to feel confident that the tools they rely on will not only be there tomorrow but will continue to improve; bugs will be addressed, and new features deployed. Developers want to know that their issues will be considered and contributions included while the communities they join remain vibrant. The Apereo Incubation Process provides scaffolding for forming and organizing new projects and communities of interest through a formal assessment and development process. Incubation includes seasoned mentors from diverse open source projects and communities to guide projects through critical formative stages; insights on the non-technical aspects of open source development--governance, fundraising, communication, etc.--creating authentic communities of practice and securing long-term viability.

The Apereo Incubation process can also help promote the Foundation, generally, with the communities currently using emerging open source tools and the organizations (colleges and universities, research facilities, edtech companies, etc.) where they were founded. After disruption due to the pandemic and now, to realize the full potential of the Apereo Incubation Process, the Incubation Working Group has been re-launched. Current activities focus on:

- Assessing and affirming the current process and updating as needed.
- Developing resources to promote the program and identify possible Apereo Incubation projects within academic and research institutions or even EdTech companies.
- Cultivating highly experienced mentors to help support Apereo Incubation projects.
Website Update and Migration

The current Apereo website's design and navigation were implemented in July 2015. Over the past eight years, the content on the site has grown as Apereo itself has. What were the latest announcements, new initiatives, news posts, etc., are often still posted, making pages feel stale and unmanaged. Technically, several local modifications, customizations, and "quick fixes" have rendered the site a bit fragile; what was done where, how, and by whom? Added to these local issues from years of internal tinkering, the current site runs on aging infrastructure, Drupal 7, while the current Drupal release is version 10. On February 23, 2022, Drupal.org announced that the end-of-life for Drupal 7 would be November 1, 2023, necessitating Apereo's migration, even if only for technical reasons.

Considering the multiple issues (aging content, local technical issues, and Drupal's end-of-life) and in consultation with Apereo's technology team, it was determined to undertake the Drupal upgrade, site redesign, and content curation simultaneously. To ensure the new site's design and content met the needs and expectations of the Apereo community, an "Apereo Website Working Group" was formed, chaired by Michelle Hall. The goals for the new Apereo website include the following:

1. An update to Drupal 10, utilizing only standard, Drupal.org templates, modules, and plugins--avoiding any customizations.
2. Implement a simple, uncluttered design and navigation.
3. Review and reduce the content on the site and enforce a management and archiving process to avoid future clutter.

The site is currently in development with an expected completion date of Fall 2023. For those interested in the website's development and status, please visit https://staging.apereo.org.

New Constituent Management System

Apereo has implemented CiviCRM, an open source constituent relationship management (CRM) platform specifically designed for nonprofit organizations and civic-sector entities. It provides a comprehensive suite of tools that will help Apereo manage various aspects of our operations, including constituent engagement, fundraising, event management, membership tracking, marketing, and more.

- Constituent Management: The Foundation has centralized Apereo membership databases, including project contributors, organizational volunteers, institutional membership, event attendees, and other contacts.
- Fundraising and Donor Management: Apereo now manages membership invoicing—and in the future, fundraising campaigns—through CiviCRM. Development is underway to accept online donations, process offline contributions, and manage donor information.
Event Management: Apereo can now offer member projects a dedicated platform for event planning and registration, allowing our community to create and promote events, manage attendee registrations, and send event-related communications.

Email Marketing and Communications: Apereo has migrated off of SurveyMonkey (saving costs) to publish the quarterly newsletter via CiviCRM. Additional tools available in the open source system provide an in-depth analysis of membership engagement while protecting readers’ privacy.

Integration of CiviCRM with Drupal, Apereo’s content management system, as part of the website upgrade and migration project.

Implementation of Electronic Voting

Accounting Systems Migration

Before 2022, Apereo’s accounting service, Rehmann, provided the Foundation with its accounting technology and platforms. These systems included remote hosting of a shared Quickbooks implementation and remote file storage for archiving financial documentation—accessible by both the accounting services and Foundation staff. This arrangement resulted in high costs as access to Quickbooks and the remote hosting and file system incurred per-user licensing fees based on Rehmann and Apereo staff headcount. These systems were underutilized by Apereo staff and provided excess/redundant services.

Throughout 2022 Apereo, under the advisement and direction of the Foundation’s controller, migrated Apereo’s historical records and Quickbooks services from these remote services to capitalize on existing Apereo resources (i.e., locally managed services and non-profit consortia services). In addition to reducing costs, this migration extended Apereo’s access to, quality of, and continuity in our bookkeeping, accounting, and records-management.

Human Resources & Payroll System Implemented

The transition in Executive Directors from a non-U.S.-based contracted role to a U.S.-based employee required several new personnel and payroll processes and procedures to comply with U.S. and state regulations. Under the advisement and direction of the Foundation's controller, Zenifits was identified and implemented as Apereos Human Resources and Payroll system.

Zenefits offers a comprehensive suite of tools that allows the Foundation to manage various HR functions from a single integrated platform. These functions include employee onboarding, benefits enrollment, time and attendance tracking, performance management, compliance assistance, and more. By centralizing these processes, Apereo aims to simplify its HR management, ensure compliance with U.S. and state regulations and save the Foundation's staff time and resources.
Apereo Member Projects

Bedework

Bedework is an enterprise calendar system supporting public, personal, and group calendaring. It conforms to current calendaring standards with a commitment to strong interoperability between other calendaring systems and clients. Bedework is built with an emphasis on higher education, though it is used by many commercial enterprises. Bedework may be deployed for public events calendaring, personal calendaring and scheduling, or both. Bedework is suitable for embedding in other applications or in portals and has been deployed across a wide range of environments. From the outset, Bedework has been very strongly standards-based.

The release of Bedework 4.0.3 in 2022 involved significant restructuring, moving away from ElasticSearch due to licensing issues, and overhauling the deployment process completely. Refactoring split off the read-only system from the read-write components, allowing deployment of a much lighter-weight service for feeds and web presence. This work continues, with the remaining work using jboss modules to deploy all code once only and made available for all services, reducing memory usage and startup time. Bedeworks’ release notes are available at https://bedework.github.io/bedework/#release-notes.

Statistics (Full report: https://cauldron.io/project/7702)
- First Release, Mar 2006; 2022 Release, May 2022, 4.0.3; Current Release, May 2022, 4.0.3
- Maintainers: 5
- Commits, 12269 (Lifetime); 93 (2022); Year-over-year, -94.11%
- Issues, 167 (Lifetime); 7 (2022); Year-over-year, 57.14%
- Reviews, 160 (Lifetime); 14 (2022); Year-over-year, -69.57%
- Commit authors, 28 (Lifetime); 4 (2022); Year-over-year, 33.33%
- Issue submitters, 32 (Lifetime); 2 (2022); Year-over-year, -50%
- Review submitters, 11 (Lifetime); 3 (2022); Year-over-year, 200%
- Estimated number of sites in use: ≈ 50

Links to repositories and downloads
- Apereo project page: https://www.apereo.org/projects/bedework
- Bedework homepage: https://bedework.github.io/
- Code repository: https://github.com/Bedework/bedework
- Install Bedework: https://bedework.github.io/download/
CAS (Central Authentication Service)

Central Authentication Service, commonly referred to as CAS, is an enterprise multilingual single sign-on solution for the web and a comprehensive platform for authentication and authorization needs. CAS is an open and well-documented authentication protocol. The primary implementation is an open source Java server component by the same name, with support for a plethora of additional authentication protocols and features.

The CAS project released 23 versions in 2022, beginning on January 17 with v6.4.50 and concluding the year with v6.6.4 on December 30. New and noteworthy features included refreshable JDBC/JPA integrations, refreshable delegated identity providers, DPoP access tokens, SSO Sessions, testing strategy, OpenID connect ID tokens, and IP geo-location. The complete release notes can be found at https://apereo.github.io/cas/6.6.x/release_notes/RC5.html.

Statistics: (Full report: https://cauldron.io/project/7703)
- Maintainers: 36
- Commits, 56599 (Lifetime); 2659 (2022); Year-over-year, -3.17%
- Issues, 450 (Lifetime); 11 (2022); Year-over-year, 0%
- Reviews, 6072 (Lifetime); 535 (2022); Year-over-year, -2.55%
- Commit authors, 650 (Lifetime); 51 (2022); Year-over-year, -34.62%
- Issue submitters, 334, (Lifetime); 11 (2022); Year-over-year, 0%
- Review submitters, 725 (Lifetime); 60 (2022); Year-over-year, -38.14%
- Estimated number of sites in use: ≈ 12,000

Links to repositories and downloads
- Apereo project page: https://www.apereo.org/projects/cas
- CAS homepage: https://apereo.github.io/cas/6.5.x/index.html
- Code repository: https://github.com/apereo/cas
- Install CAS: https://apereo.github.io/cas/6.5.x/planning/Installation-Requirements.html
ELMS Learning Network / HAX The Web

ELMS:LN / HAX is a collection of modular and inter-related educational software libraries to build sustainable Next Generation Digital Learning Environments. The primary project, Headless Authoring eXperience (HAX), brings a rich text block editor to the web in a portable fashion, unbound to any single platform. It also provides a full content management system called HAXcms for building Open Educational Resources in standard HTML. HAX The Web is intended for faculty members and instructional designers building interactive online materials. Content written in HAXcms is in a forever format because the h-a-x tag reads and writes HTML.

ELMS/HAX saw several releases over 2022; version 4.0.0 was released March 11, 2022, version 5.1.0 on August 18, 2022. Development focused on a new Request Intake process, full-screen capability, and fixing sticky corner bugs in the video player; full-featured, reimagined Outline Designer; Smart Lesson and Insights capabilities; ability to internally link content, Block level operation panel; tables are editable in context with a full-featured table editor; new courses can be generated from .DOCX files; Outline designer now supports importing, reviewing, and modifying content from .DOCX files; ability to reder remote content.

Statistics: (Full report: https://cauldron.io/project/7704)
- First Release, Feb 2019; 2022 Release, None; Current Release, Jan 2023 v7.0.10
- Maintainers: 1
- Commits, 19255 (Lifetime); 158 (2022); Year-over-year, -92.15%
- Issues, 1082 (Lifetime); 0 (2022); Year-over-year, -100%
- Reviews, 2096 (Lifetime); 0 (2022); Year-over-year, -100%
- Commit authors, 158 (Lifetime); 12 (2022); Year-over-year, -58.62%
- Issue submitters, 46, (Lifetime); 0 (2022); Year-over-year, -100%
- Review submitters, 87 (Lifetime); 0 (2022); Year-over-year, -100%
- Estimated number of sites in use: ≈ 10

Links to repositories and downloads
- Apereo project page: https://www.apereo.org/projects/elms-learning-network
- ELMS LN homepage: https://elmsln.org/
- Code repository: https://github.com/elmsln/elmsln
- Install ELMS LN: https://github.com/elmsln/elmsln/releases
Karuta

Karuta is a flexible platform for the incremental development and publication of digital portfolios or “e-portfolios” for various purposes, including showcasing student/faculty work, curating educational content, and conducting assessments. Instructional designers can quickly build portfolio templates by creating pages, adding multi-media resources (text, documents, comments, etc.), and developing workflows. Karuta provides multiple roles (student, evaluator, etc.) to manage content and administer access/use.

Karuta released version 3.2.1 in Sep 22, 2022, which focused on Karuta’s “front-end” with an overall system update on Dec 13, 2022.

Statistics: (Full report: https://cauldron.io/project/7705)
- First Release, Sep 2014; 2022 Release, Mar 2022 3.1Beta; Current Release, Mar 2022 3.1Beta
- Maintainers: 3
- Commits, 2427 (Lifetime); 251 (2022); Year-over-year, 25.5%
- Issues, 179 (Lifetime); 3 (2022); Year-over-year, -57.14%
- Reviews, 179 (Lifetime); 8 (2022); Year-over-year, -77.14%
- Commit authors, 50 (Lifetime); 13 (2022); Year-over-year, 62.5%
- Issue submitters, 17, (Lifetime); 1 (2022); Year-over-year, -75%
- Review submitters, 11 (Lifetime); 2 (2022); Year-over-year, -33.33%
- Estimated number of sites in use: ≈ 25

Links to repositories and downloads
- Aperuo project page: https://www.apereo.org/projects/karuta
- Karuta homepage: http://karutaproject.org
- Code repository: https://github.com/karutaproject
- Install Karuta: https://www.eportfolium.com/cooperative/application/htm/cooperative.htm
OnTask

OnTask is a platform to provide data-driven personalized messages in a learning environment. The target audiences are instructors and course designers who want to provide learners with personalized messages to promote engagement, coaching, or simply as a conversation starter. Users manage a collection of “workflows.” Each workflow contains a data table and a set of actions. The actions are message templates with conditions and filters to change their appearance based on the data stored in the table. OnTask provides a one-stop shop to manipulate the table and the corresponding actions to communicate with large student cohorts.

No new/updated versions of OnTask were released in 2022. The latest version prior to 2022 was version 7.2, released on Jul7 4, 2020

Statistics: (Full report: https://cauldron.io/project/6630)

- First Release, Nov 2017; 2022 Release, None; Current version, Apr 2023, v10.3
- Maintainers: 5
- Commits, 3322 (Lifetime); 229 (2022); Year-over-year, 7.51%
- Issues, 177 (Lifetime); 2 (2022); Year-over-year, 0%
- Reviews, 63 (Lifetime); 13 (2022); Year-over-year, 0%
- Commit authors, 7 (Lifetime); 2 (2022); Year-over-year, 100%
- Issue submitters, 20, (Lifetime); 2 (2022); Year-over-year, 0%
- Review submitters, 6 (Lifetime); 1 (2022); Year-over-year, 0%
- Estimated number of sites in use: ≈ 25

Links to repositories and downloads

- Aperaeo project page: https://www.apereo.org/projects/ontask
- OnTask homepage: https://www.ontasklearning.org/
- Code repository: https://github.com/abelardopardo/ontask_b
Opencast

Opencast is a video management system for academic institutions. It covers all stages of the video lifecycle from live streaming, recording (lecture capture), and video upload/ingest to processing/encoding, publishing, playing, and archiving video assets. It's scalable from a one-server installation to mass production in the cloud and versatile to play with other academic systems (LMS, course catalogs etc.). Additional modules exist to meet requirements beyond the core features, Opencast Studio for web-based video production, Video Annotation Tool, etc.

Opencast offered twenty-four releases (minor and major releases, updates, patches, security, etc.) throughout 2022. These releases covered two production versions, v12 and v13. Feature improvements in v13 included new plugin management, comments in the event index, support for f4v file type, Whisper as new speech-to-text engine, specialist worker notes added, and new “assert” workflow operation. Version 13 improvements included a faster fading effect for cuts from the video editor, default resolution of live schedule changed to standard 16:9, JobDispatcher extracted from ServiceRegistry, PostgreSQL now fully supported, multiple send-email improvements. Complete release noted for Opencast v13 and previous versions can be found at https://docs.opencast.org/r/13.x/admin/#releasenotes/#_top.

Statistics: (Full report: https://cauldron.io/project/6631)
- Maintainers: 13
- Commits, 33963 (Lifetime); 86 (2022); Year-over-year, -97.82%
- Issues, 1250 (Lifetime); 13 (2022); Year-over-year, -94.01%
- Reviews, 5065 (Lifetime); 48 (2022); Year-over-year, -96.85 %
- Commit authors, 411 (Lifetime); 9 (2022); Year-over-year, -86.76%
- Issue submitters, 142, (Lifetime); 4 (2022); Year-over-year, -92.73%
- Review submitters, 129 (Lifetime); 8 (2022); Year-over-year, -82.22%
- Estimated number of sites in use: ≈ 200

Links to repositories and downloads
- Apereo project page: https://www.apereo.org/projects/opencast
- Opencast homepage: https://opencast.org/
- Code repository: https://github.com/opencast
- Install Opencast: https://docs.opencast.org/r/9.x/admin/#installation/#_top
openEQUELLA

openEQUELLA is a digital repository providing a single platform to house teaching and learning, research, media, and library content. openEQUELLA has been deployed for copyright resource collections, research materials, managing and exposing materials through websites and portals, content authoring, workflow, institutional policy, and organizational resources.

For 2022.2, work focused on build processes to validate development and release versions. This resulted in greater coverage for testing, while also increasing security of the build process. Key outcomes include: Increased automated end-to-end testing, with each run testing: New UI against PostgreSQL and SQL Server; Integration testing of the New UI code used to communicate with the openEQUELLA REST API; unit testing of all the new UI components and key parts of the server; increased security of the build process and integration points; improved reporting; additional security checks and automated testing.

Feature specific additions include a new Search UI applied to the My Resources pages, Scrapbook updated with “Add to Scrapbook” to Upload files and Author new web pages, Moderation queue shows items currently in moderation and progress, OpenMetrics / Prometheus support, and FFmpeg replaces LibAV requirement. Full release notes available at https://docs.edalex.com/books/features-guides/page/openequella-20222-features-guide

Statistics: (Full report: https://cauldron.io/project/7707)
- First Release, Oct 2017; 2022 Release, Nov 2022, v2022.2.0; Current version, Nov 2022, v2022.2.0
- Maintainers: 2
- Commits, 7911 (Lifetime); 51 (2022); Year-over-year, -96.92%
- Issues, 1068 (Lifetime); 0 (2022); Year-over-year, -100%
- Reviews, 3222 (Lifetime); 8 (2022); Year-over-year, -96.85%
- Commit authors, 411 (Lifetime); 9 (2022); Year-over-year, -86.76%
- Issue submitters, 142, (Lifetime); 4 (2022); Year-over-year, -92.73%
- Review submitters, 129 (Lifetime); 8 (2022); Year-over-year, -99.21%
- Estimated number of sites in use: ≈ 50

Links to repositories and downloads
- Apereo project page: https://www.apereo.org/projects/openequella
- openEQUELLA homepage: https://openequella.github.io/
- Code repository: https://github.com/openequella/openEQUELLA
- Install openEQUELLA: https://openequella.github.io/download.html
Sakai

Sakai is a feature-rich, learning management solution used by a diverse and global adopter community. Sakai provides a wealth of powerful, flexible tools that enable great teaching, compelling learning, and dynamic collaboration. Thanks to Sakai's responsive design, instructors and students can achieve their academic goals no matter where they are or what device they use. Sakai's breadth of features means you can choose the tools that meet your needs. Out of the box, Sakai includes all of the standard online learning, teaching, and collaboration tools found in modern learning platforms. In addition, Sakai has a wide range of community-contributed tools and external integrations available as add-on components. Sakai's open source flexibility allows configuration or customization, as much or as little as needed.

Sakai 22 introduces Conversations, a brand new Sakai communication tool, as well as enhancements to Lessons, LTI, Assignments, and more. Development goals for Sakai are to become more nimble, lighter, and more responsive as a product and as a community. Sakai 22.2 saw 119 improvements, including 18 fixes in Assignments and 16 fixes in Tests & Quizzes. Other areas improved include Accessibility, Calendar, CKeditor, Commons, Email Archive, Entity Broker, Feedback tool, Forums/Discussions, Gradebook, Lessons, Polls, Portal, Profile, Resources, Roster, Rubrics, Search, Section Info, Sign Up, Site Info, Statistics, Syllabus, Web Content, and the Wiki. Compete release notes can be found at https://sakaiproject.atlassian.net/wiki/spaces/DOC/pages/32201506818/Sakai+22+Release+Notes

Statistics: (Full report: https://cauldron.io/project/7708)
- First Release, Jun 2004; 2022 Release, Dec 2022, v22.2; Current version, Jul 2023, v23
- Maintainers: 11
- Commits, 61280 (Lifetime); 1960 (2022); Year-over-year, -20%
- Issues, 25 (Lifetime); 2 (2022); Year-over-year, 0%
- Reviews, 11742 (Lifetime); 1089 (2022); Year-over-year, -19.09%
- Commit authors, 419 (Lifetime); 58 (2022); Year-over-year, -17.14%
- Issue submitters, 10, (Lifetime); 1 (2022); Year-over-year, 0%
- Review submitters, 229 (Lifetime); 53 (2022); Year-over-year, 3.92%
- Estimated number of sites in use: ≈ 300

Links to repositories and downloads
- Apereo project page: https://www.apereo.org/projects/sakai-lms
- Sakai homepage: https://www.sakailms.org/
- Code repository: https://github.com/sakaiproject
- Install Sakai: https://source.sakaiproject.org/release/
UniTime

UniTime is a comprehensive educational scheduling system supporting course and exam timetables, managing changes to these timetables, sharing rooms with other events, and scheduling students to individual classes. It is a distributed system that allows multiple university and departmental schedule managers to coordinate efforts to build and modify a schedule that meets their diverse organizational needs while allowing for minimization of student course conflicts. It can be used alone to create and maintain a school's schedule of classes and/or exams or interfaced with an existing student information system.

UniTime's June 2022 release included updates to student scheduling with wait-listing, matching courses by campus, and displaying not-assigned no-sub courses; permissions for external managers, extended parameters for instructor availability, maximum consecutive full and half days were also added. The Timetable Grid is now exportable in XLS format. Administrative updates include room utilization report helpers and access to external IDs in the name formatting. The complete release notes can be found at https://github.com/UniTime/unitime/releases?page=1.

Statistics: (Full report: https://cauldron.io/project/7710)
- First Release, Sep 2007; 2022 Release, Jun 2022, v4.6 build 96; Current version, Apr 2023, v4.6 build 91
- Maintainers: 10
- Commits, 11289 (Lifetime); 566 (2022); Year-over-year, 24.94%
- Issues, 108 (Lifetime); 14 (2022); Year-over-year, -6.67%
- Reviews, 69 (Lifetime); 28 (2022); Year-over-year, 250%
- Commit authors, 27 (Lifetime); 4 (2022); Year-over-year, -50%
- Issue submitters, 53, (Lifetime); 8 (2022); Year-over-year, -27.27%
- Review submitters, 31 (Lifetime); 14 (2022); Year-over-year, 133.33%
- Estimated number of sites in use: ≈ 10

Links to repositories and downloads
- Apero project page: https://www.apereo.org/projects/unitime
- UniTime homepage: https://www.unitime.org/
- Code repository: https://github.com/UniTime/unitime
- Install UniTime: https://github.com/UniTime/unitime/releases
uPortal

uPortal is the leading open source enterprise portal framework built by and for the higher education community. uPortal continues to evolve through contributions from its global community and is supported by resources, grants, donations, and membership fees from academic institutions, commercial affiliates, and non-profit foundations. uPortal is built on open standards-based technologies such as Java and XML and enables easy, standards-based integration with authentication and security infrastructures, single sign-on secure access, campus applications, web-based content, and end-user customization. uPortal can easily integrate with other enterprise systems and can be customized for specific local needs.

The 2022 releases included new features such as event analytics publishable to webpages; adding IP addresses to login events; updates to AnalyticsPortalEvents; update to support Java 11 and extended APIs as well as several other fixes and documentation updates. The complete list of features, updates, and fixes can be found at https://github.com/uPortal-Project/uPortal/releases.

Statistics: (Full report: https://cauldron.io/project/7711)
- First Release, 2001; 2022 Release, Dec 2022, v5.13.1; Current version, Jun 2023, v5.15.0
- Maintainers: 3
- Commits, 24398 (Lifetime); 810 (2022); Year-over-year, 82.02%
- Issues, 156 (Lifetime); 8 (2022); Year-over-year, -27.27%
- Reviews, 3385 (Lifetime); 294 (2022); Year-over-year, 24.05%
- Commit authors, 239 (Lifetime); 18 (2022); Year-over-year, 20%
- Issue submitters, 24, (Lifetime); 7 (2022); Year-over-year, 40%
- Review submitters, 103 (Lifetime); 9 (2022); Year-over-year, 12.5%
- Estimated number of sites in use: ≈ 100

Links to repositories and downloads
- Apero project page: https://www.apereo.org/projects/uportal
- uPortal homepage: https://uportal-project.github.io/
- Code repository: https://github.com/uPortal-Project/uPortal
- Install uPortal: https://github.com/uPortal-Project/uPortal/releases
Xerte

Xerte is an e-learning authoring tool and content management system designed to create interactive and accessible online learning materials. The Xerte authoring tool allows educators and instructional designers to create rich, interactive, and multimedia-rich learning content without requiring extensive technical skills. It supports various content types such as text, images, audio, video, quizzes, interactive activities, and more.

The XerteProject offered several new features and enhancements in version 3.11, including new Image sequence pages that animate images in a sequence through scrolling. Other improvements were made in accessibility, new editable/extendable home page links; defining a maximum width of content for most page types; responsiveness, where pages resize according to the size of the browser; and editable header background and default titles colors. New functionality has also been added to the following pages: 360° Image Cubemap option, Adaptive Content Page, Advanced Image, Annotated Diagram, Creating a flexible hotspot screenshot, Crossword, Screenshot showing new crossword page optional properties, Decision Tree, Screenshot of deprecated Target ID property in editor, Graphics & Sound, Hotspot Question, Screenshot of hotspot question language fields, Interactive List, Multiple Perspectives, Opinion, Sortable Grid, and Documentation. Xerte’s 3.11 release notes are available at https://xot.xerte.org.uk/play.php?template_id=81#v311

Statistics: (Full report: https://cauldron.io/project/7712)
- Maintainers: 1
- Commits, 7998 (Lifetime); 491 (2022); Year-over-year, -28.53%
- Issues, 1084 (Lifetime); 87 (2022); Year-over-year, -7.45%
- Reviews, 155 (Lifetime); 10 (2022); Year-over-year, 66.67%
- Commit authors, 77 (Lifetime); 9 (2022); Year-over-year, -30.77%
- Issue submitters, 33, (Lifetime); 8 (2022); Year-over-year, -20%
- Review submitters, 24 (Lifetime); 1 (2022); Year-over-year, -66.67%
- Estimated number of sites in use: ≈ 350

Links to repositories and downloads
- Apereo project page: https://www.apereo.org/projects/xerte
- Xerte homepage: https://www.xerte.org.uk
- Code repository: https://github.com/thexerteproject
Financials

Finance Committee

Per the Apereo by-laws (Article VIII, Section B), the Board shall annually determine the membership of two (2) Standing Committees, a Remuneration Committee and an Audit Committee. These two committees were realized through the formation of the Apereo Finance Committee (January 2022).

The Finance Committee will:

1. Operate under the Finance Committee Charter. The Finance Committee shall review the Finance Committee Charter annually; suggested changes shall be recommended to and approved by the Board.

2. Oversee the Foundation’s financial policies, including risk management, and recommend appropriate revisions to the Board. The Finance Committee will review the Foundation’s compliance with such policies annually and report results to the Board.

3. Review the Foundation’s financial statements on a minimum of a quarterly basis with Management. Financial statements shall include comparisons to prior month or year and comparisons to the budget where applicable.

4. Review the annual budget and submit the budget to the Board for approval along with recommendations.

5. Manage the Audit Policy.

6. Review the annual tax return(s), including Internal Revenue Service Form 990, prepared by Management. Review includes discussing mission review, significant assumptions, changes from prior years, and concerns. The Finance Committee will include a report to the Board regarding tax return review. The Board will approve the annual tax return(s) in writing.

7. Manage the Investment Policy.

8. Issue regular reports to the Board.

9. Review other appropriate financial information concerning the Foundation and accomplish additional tasks as charged by the Board’s Executive Committee.

10. Guide the annual Executive Director and other appropriate Foundation employees’ assessment and evaluation process.

2022 Finance Committee Members

- Theresa Rowe, Apereo Board Treasurer, Chair
- Anne-Marie Scott, Apereo Board Chair
- Stuart Phillipson, Apere Board Director
- Patrick Masson, Apereo General Manager (ex officio)
- Phyllis Dobbs, Apereo Controller (ex officio)
- Jim Helwig, outside expert/consultant (volunteer)
Fiscal Sponsorship, Allocation Review

Apereo serves as a fiscal sponsor to its member projects and communities, offering a legal arrangement in which the Foundation (the fiscal sponsor) provides financial and administrative services to another organization/project (the sponsored project) that may not have tax-exempt status. Sponsors manage the funds on behalf of the sponsored project and ensure they are used for charitable or tax-exempt purposes.

As an outcome of Apereo’s Operational Review, an assessment of Apereo’s fiscal sponsorships, including a review of allocated funds to member projects and communities, was undertaken. A thorough review of contributions, membership dues, subscriptions, and other revenue highlighted historical accounting and reporting errors that resulted in inaccurate fund balances for Apereo member projects and communities. Many funds originally directed to Apereo projects were allocated to the Foundation. In order to rectify these errors and ensure donor contributions were directed appropriately, a process to identify and reallocate funds was undertaken, overseen by both the Apereo Financial Committee and the Apereo Board of Directors.

**February 2022:** Apereo Board of Directors reviews the analysis and discusses the funding impact on affected projects. Both the Finance Committee and Board recognize that all historical spending, project budgeting, and reporting by affected projects were undertaken in good faith, based on the financial reporting presented to them by Apereo’s historical accounting and financial services.

**March 2022:** Apereo Finance Committee recommends and the Apereo Board of Directors agree on a reallocation approach, process, and funding with a focus on accuracy and minimizing disruption to affected projects. Outlined remaining steps.

**April 2022:** After analysis by Apereo’s accounting team and controller, final funds for reallocation were confirmed, and a process for bringing member project accounts into alignment was offered. The General Manager and accounting staff began work with the projects to better understand any impacts of the reallocation over time.

**METHODOLOGY**
Run complete list of members via QuickBooks. Annotate “All Members” using the following:

1. Find Jasig/Sakai schools from 2012/2013
   a. If Jasig school, allocate revenue of $500 to CAS, $1,000 to uPortal, reduce Foundation revenue
   b. If Sakai school, allocate revenue at 30% of non-event funds to Sakai, reduce Foundation revenue
2. Find Bedework schools
   a. Allocate $500 to Bedework and reduce Foundation revenue
3. Find uPortal schools
   a. Allocate $1,000 to uPortal and reduce Foundation revenue
   b. Check for CAS - there is often CAS where there is uPortal, but not always
4. Review membership trends from 2016-2021 and membership for 2022
   a. Allocate annual revenue using below chart unless clear, recent trend using different amounts is present:

<table>
<thead>
<tr>
<th></th>
<th>$500</th>
<th>$1,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bedework</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OAE</td>
<td>N.A.</td>
<td></td>
</tr>
<tr>
<td>Opencast</td>
<td>$1,000</td>
<td></td>
</tr>
<tr>
<td>Sakai</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>uPortal</td>
<td></td>
<td>$1,000</td>
</tr>
</tbody>
</table>

**May 2022:** Apereo Board of Directors reclassifies certain 2013 to 2022 membership invoices to fiscal sponsors including Bedework, CAS, Opencast, Sakai, and uPortal based on published usage, historic trends, and pre-Sakai Foundation/JASIG Foundation membership records.
## Consolidated Financials 2021-2022

### REVENUE ($ in thousands)

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Service Revenue</td>
<td>$30</td>
<td>$47</td>
<td>63.8</td>
</tr>
<tr>
<td>Contributions, Membership Dues, and Grants</td>
<td>$485</td>
<td>$665</td>
<td>72.9</td>
</tr>
<tr>
<td>Other Revenue</td>
<td>$1</td>
<td>$1</td>
<td>100</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>$516</td>
<td>$713</td>
<td>72.3</td>
</tr>
</tbody>
</table>

### EXPENSE ($ in thousands)

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Service Expenses</td>
<td>$21</td>
<td>$28</td>
<td>75</td>
</tr>
<tr>
<td>Staffing</td>
<td>$0</td>
<td>$0</td>
<td>0</td>
</tr>
<tr>
<td>Information Technology</td>
<td>$224</td>
<td>$325</td>
<td>68.9</td>
</tr>
<tr>
<td>Insurance</td>
<td>$4</td>
<td>$4</td>
<td>100</td>
</tr>
<tr>
<td>Legal &amp; Professional Expenses</td>
<td>$141</td>
<td>$137</td>
<td>103</td>
</tr>
<tr>
<td>Other Expenses</td>
<td>$25</td>
<td>$30</td>
<td>83.3</td>
</tr>
<tr>
<td><strong>Total Expense</strong></td>
<td>$415</td>
<td>$524</td>
<td>79.1</td>
</tr>
</tbody>
</table>

### NET INCOME

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET INCOME</td>
<td>$101</td>
<td>$189</td>
<td>53.4</td>
</tr>
</tbody>
</table>

### ASSETS ($ in thousands)

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$824</td>
<td>$789</td>
<td>104</td>
</tr>
<tr>
<td>Accounts Receivable - Net</td>
<td>$62</td>
<td>$38</td>
<td>163</td>
</tr>
<tr>
<td>Other Current Assets</td>
<td>$4</td>
<td>$3</td>
<td>133</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$890</td>
<td>$830</td>
<td>107</td>
</tr>
</tbody>
</table>

### LIABILITIES AND NET ASSETS

#### LIABILITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deferred Revenue</td>
<td>$294</td>
<td>$295</td>
<td>99.6</td>
</tr>
<tr>
<td>Accounts Payable and Other Liabilities</td>
<td>$2</td>
<td>$43</td>
<td>04.6</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td>$296</td>
<td>$338</td>
<td>87.5</td>
</tr>
</tbody>
</table>

#### NET ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Assets Without Donor Restrictions</td>
<td>$157</td>
<td>$91</td>
<td>172</td>
</tr>
<tr>
<td>Net Assets With Donor Restrictions</td>
<td>$437</td>
<td>$401</td>
<td>107</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td>$594</td>
<td>$492</td>
<td>120</td>
</tr>
</tbody>
</table>

### TOTAL LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>2022</th>
<th>2021</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL LIABILITIES AND NET ASSETS</td>
<td>$890</td>
<td>$830</td>
<td>107</td>
</tr>
</tbody>
</table>
Thank You

Albany Medical College
Blindside Networks
Brigham Young University
Brock University
Claremont Colleges
Duke University
ELAN e.V.
Entornos de Formación S.L (EDF)
ePortfolium
ETH Zürich
Hochschule für Technik Stuttgart / University of Applied Sciences
Hotelschool the Hague
INP Toulouse
Kanematsu Electronics
Kyoto University
Lafayette College
LAMP
Learning Experiences
Longsight
MCI Management Center, Innsbruck
Nagoya University
Oakland University
Pepperdine University
Princeton University
Roger Williams University
Rutgers University
Tirasa
Unicon
Universidad Politecnica de Valencia
Universidad Publica de Navarra
Universitat de Lleida
Universität Konstanz
Université Polytechnique Hauts-de-France
University of Cape Town
University of Edinburgh
University of Manchester
University of Michigan
University of Michigan ITS
University of North Carolina, Chapel Hill
University of Stuttgart
Western University - Canada