

The Apereo Foundation Annual Report represents a summary of Foundation activity over the course of the year 2015-2016. It is presented to the Apereo Annual General Meeting, which in 2016 takes place at NYU in New York City, 22nd to 26th May 2016.

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Introduction - from the Executive Director

One of the objectives of bringing Jasig and Sakai together in a common foundation - Apereo - was to provide a more rational framework for the development of open source software serving education, avoiding duplication of function and service where possible. In founding Apereo, we made an assumption that other projects and communities would see the value in such a proposition. Three years in, that assumption has proved substantially correct. Apereo now provides an umbrella for ten software communities, with a further seven in incubation. Some of those communities, such as Xerte, Opencast and Unitime, had existed independently before Apereo. Others, such as Karuta, established by partners spanning three continents, were very much the product of the broad Apereo community.

The last year, largely dominated by consolidation, has also seen growth into new areas for the Apereo community. The POET Group, a group of commercial partners working to enhance Moodle plug-ins, became an Apereo incubating community late in 2015. Apereo has also worked with the K12 Federation, a group of statewide initiatives bringing together high school districts, to explore the potential for closer collaboration around software sustainability. Three of these statewide initiatives, in Nebraska, Illinois and Nevada, have recently joined Apereo.

In last year's Annual Report we noted the widespread acceptance of openness in education, and the misuse of the term "open" to describe and sell software that fails many of defining characteristics of openness. This problem hasn't gone away. We have worked with our partners the Open Source Initiative, Red Hat and ESUP-Portail to organize the Open Summit in May 2016, immediately before the Open Apereo Conference. There are three essential purposes to the event. The first is to stimulate dialogue between open initiatives in education. All too often we operate in open silos, which reflect the silos in education generally. Increased dialogue, we hope, will lead to improved understanding, coordination and alignment where appropriate. The second purpose is to help develop participants understanding of openness and it's many facets by exploring the benefits of openness across many domains and areas of work. The third purpose of the event is to analyze the lessons of open initiatives and open approaches to organisation, and understand how those organisational approaches might inform a transformation of education. As a whole, the agenda is ambitious, but it has to begin somewhere.

With ten software communities maintaining and developing software in the service of educational mission delivery, and a further seven in incubation, Apereo is well positioned to participate in the developing discussion about what follows the learning management system/virtual learning environment, and the future of learning online. The transformation of the LMS has been discussed for almost as long as it has existed. What seems clear from the Educause Learning Initiative consultation on the topic, which engaged many dozens of campus learning and information technologists, together with faculty and institutional leaderships is that the appetite for change is strong.

A more flexible and pluggable environment, capable of customization and personalization to meet the needs of learners, teachers and providers more closely is clearly on the agenda of substantial sections of the higher education community. As a distinct community within that - and a community with a strong record of driving standards development such as Learning Tools Interoperability (LTI) - we should and are engaging in the conversation surrounding the Next Generation Digital Learning Environment.

As one surveys the broad Apereo Community, it's clear that we can contribute many pieces to this emerging landscape. We have a collaboration and learning environment in Sakai that is about to make a very significant release. Opencast has clearly emerged as a media platform for education. Xerte enables the authoring of highly accessible and interactive learning content. Karuta is a highly flexible, next generation portfolio solution. uPortal - which should more properly be described as an ecosystem than an application at this point - is capable of rich levels of customization and personalization. Apereo Open Academic Environment allows collaboration beyond the classroom, across the institution, and across institutions themselves. Underpinning these forward-facing

components, we have communities that develop software that provides services to handle calendaring, single sign-on, timetabling of courses and examinations, and an open analytics platform that is attracting considerable attention and adoption.

We will not build the future alone, however. Apereo was established around the need for dialogue, partnership, and respect for the cultures and priorities of those we engage with. In the coming year we will act to further strengthen our existing partnership with ESUP-Portail, and its engagement with the Francophone world, and our collaboration with SoLAR around learner analytics. We hope the conversations we stimulate at the Open Summit in 2016 will lead to new collaborations.

It is also important, though, to recognize that we will not build the future environment we need by driving communities down paths they do not believe are right for them, or are misaligned with their tactical or strategic priorities. Our community memory is strong. The attempt to align uPortal, just emerging from grant-funded status, with the yet to-be-created Sakai environment over ten years ago taught a lesson we would do well to remember: the Foundation facilitates, it does not control. It encourages, but does not mandate. The Foundation exists to do those things *collectively* that the community it supports cannot do better *separately*.

Effective facilitation and encouragement require resources. Having put in place the building blocks, we need to do more to enable our community to build with them. At Open Apereo 2016 the Foundation launches its individual membership program, 'Friends of Apereo'. The funding we raise with this initiative will be applied entirely to community recognition programs such as the Apereo Teaching Awards and the Fellows Program. But more effective recognition of our many volunteers, both individual and institutional, can only be the start of increasing our resource base. Our new membership structure, reported below, lays an equitable basis for Foundation and software community resource gathering. Remembering our international nature, we have work still to do to ensure all regional and national communities within Apereo are also treated equitably in this respect.

In the last quarter of 2016, a general membership drive will seek to engage and encourage further institutional and commercial partners. If you can help in any way with that – as an ambassador, or a contact point, or in reaching out to other schools – we'd love to hear from you. Presenting at a regional or national conference? Consider including a slide or two on Apereo. Our community can be a powerful voice for change. Help us make sure that "100% open, supporting education" is a message that reverberates throughout education.

Ian Dolphin, Executive Director, May 2016

1 Incubation

Many of the initial wave of incubating projects graduated incubation in 2014-2015, as they were pre-existing communities that needed minimal adjustment - usually around inbound licensing - before graduation. There was therefore a change in the pace of incubation and the work of the Apereo Incubation Working Group over the course of the year.

Of the newer incubating projects that were "greenfield" developments, Karuta, a next generation ePortfolio framework graduated incubation in October 2015. From September, the Incubation Working Group worked to onboard new incubating projects, a cluster of which are part of the Apereo Open Analytics Platform; OpenLRS, OpenDashboard, and Learning Analytics Processor. A further new incubating project, Image Quiz, entered the process at the close of 2015. EDexchange remains in development and in incubation.

The Incubation Working Group meets by teleconference once per month. Incubation mentors meet projects as required, but three or four calls per year are the norm. If you are interested in becoming an Incubation Mentor, please contact the Executive Director.

2 Currently Incubating Projects

EDexchange, a project of the Postsecondary Electronic Standards Council (PESC) Common Data Services (CDS) Task Force of over 30 institutions and vendors, aims to create a secure network for the exchange of transcripts between US educational institutions. The open source, web service based software EDexchange creates has the potential to be utilized to setup secure networks to exchange education data regionally and locally in many countries.

Image Quiz. The goal of the Image Quiz Project is to increase comprehension of complex subjects through visual learning. This goal is accomplished through the development of a series of computer-based visual training programs under the working title Image Quiz. Programs in the Image Quiz family are designed to rapidly help users become visual experts. Unlike novices, visual experts are able to quickly recognize patterns. This allows chess masters to recognize meaningful chess configurations, and field biologists to identify organism from a mere glance.

Learning Analytics Processor. The Learning Analytics Processor project is aimed at accelerating the future of predictive learning analytics through the development of a flexible and highly scalable tool that will facilitate everything from academic early alert systems to data visualizations. Along with this powerful "big data" tool will come a library of open predictive models which can be shared across higher education free of licensing costs and, most importantly, allow institutions to collaborate on enhancing and improving these models over time.

OpenDashboard is a web application that provides a framework for displaying visualizations and data views called "cards". Cards represent a single discrete visualization or data view but share an API and data model. OpenDashboard is a Java application built with Spring Boot.

OpenLRS is an source Java based Learning Record Store which is compatible with Experience API.

POET is a group of people and organizations that believe in the power of open source to innovate and advance their learning and educational solutions. By working together under a single organization, POET's members can provide additional resources to help advance the open source projects that matter to them.

Tsugi. The goal of Tsugi is to build a scalable multi-tenant "tool" hosting environment based on the emerging IMS standards to help move the industry toward a Next Generation Digital Learning Environment (NGDLE <https://net.educause.edu/ir/library/pdf/eli3035.pdf>). The use of this framework does not automatically imply any type of IMS certification. Tools and products that use this framework must still go through the formal certification process through IMS (www.imsglobal.org).

Please see www.apereo.org for links to further information and incubation records.

3 Membership Dues Restructuring

When Jasig and Sakai merged to form Apereo, an interim dues structure was established. This resolved differences between the two former membership structures and established uniform bands around turnover/revenue. It was always the intention to move away from the interim structure within a two-three year timeframe, and establish a structure that better reflected Apereo as a multi-software community Foundation. During the course of July to October 2015, a Foundation Board working group established a new membership structure that consists of a mandatory, core foundation element, and an optional supporting subscription for software communities. The new structure was modeled carefully to avoid revenue loss or other damage. While increasing the complexity of membership processing and invoicing slightly, the new system has the advantage of being equitable and flexible. Transition to the new system is expected to take one to two years.

During the last quarter of 2015 the Foundation consulted member representatives on a new category of membership -individual membership. This was particularly driven by requests from former Jasig and Sakai community participants who have left higher education, and were seeking a means to continue to contribute to the work of the Foundation. The new membership category is named 'Friends of Apereo', and will cost \$100. Members will obtain a \$50 discount on Open Apereo registration fees, and will vote for a Foundation Board member. Funding raised from 'Friends of Apereo' will support recognition and award programs, primarily the Fellows and ATLAS Awards. The Foundation Board amended the Apereo Foundation by-laws to allow the new category of membership.

4 New members

New members joining Apereo in the course of 2015-16 include Jisc, the POET Partners - Remote Learner (US) and Lambda Solutions, and K12 Federation state groups in Nebraska, Nevada and Illinois. The University of Lleida re-joined the Foundation in the same period.

5 Intellectual Property Rights

Management of Intellectual Property Rights is an important function the Foundation provides for the community. This fall into two main areas – Trade and Service Mark registration and maintenance, and inbound and outbound licensing.

Trade and Service Marks. The Foundation maintains registration of Trade and Service Marks for constituent software and other communities. This registration takes place in the United States, and can be cascaded to other jurisdictions that are signatories of the Madrid Treaty. Open Apereo, Apereo, Bedework, CAS, Karuta and Sakai have completed re-registration or initial registration in the course of 2015-2016.

Licensing. From their inception, Jasig and Sakai have operated an outbound licensing regime based around BSD style licenses, primarily Apache or Educational Community licenses. The entry into membership of the POET Group partners, with their objectives of creating tools and services to strengthen Moodle plug-ins, modified this approach to allow outbound GPL style licenses by Board decision. The Apereo inbound licensing regime remains unchanged.

6 Newsletter

In July 2015 Apereo re-launched a regular newsletter, with Foundation Board member Lucy Appert as Editor. This has grown in coverage and depth over the course of the year, and feeds the Foundation web site. Newsletter items can be forwarded to newsletter@apereo.org, and the newsletter is distributed via the announcement mailing list. Subscription details of this, and other Apereo mailing lists can be found at <https://www.apereo.org/content/contact-and-mail-lists>.

7 Apereo Teaching and Learning Awards (ATLAS)

The 2016 Apereo teaching and learning awards (ATLAS) program has undergone a significant evolution over the course of the past year. Salwa Khan, who had chaired the Teaching with Sakai Innovation Awards (TWSIA) committee for several years, stepped down as chair. Cheryl Brown (University of Cape Town) and Luisa Li (Marist College) - both existing committee members - took over as co-chairs. Salwa has continued her committee membership and been invaluable in guiding the incoming chairs in their new role.

One of the first issues that the committee addressed was the expansion of the awards beyond Sakai and OAE. Virtual meetings in early September and started to work towards opening up the committee membership and application process. We were pleased to draw Xerte community members into the discussion process. After much deliberation, this resulted in a name change from TWSIA to ATLAS. This change reflected the desire to acknowledge teaching and learning innovation in the broader Apereo community. Award categories were adjusted and the committee continued to refine the rubrics so as to be more adaptable to a wider range of innovative teaching and learning practices using a greater breadth of Apereo software.

The rebranded awards didn't receive a large number of entries, but the process attracted many excellent entries using not only Sakai, but also Xerte and OpenCast. The quality of applications was such that the committee had a hard time settling simply on winners, and consequently awarded 3 winners and 2 honorable mentions.

Any change of "brand" is difficult to market. The ATLAS committee will run a "birds of a feather" sessions at Open Apereo 2016 to increase community awareness of ATLAS. Having ironed out some of the issues and challenges that arose as a result of expansion, the Awards Committee are confident that they can begin to market the 2017 ATLAS much earlier in the year and thus increase interest and support.

2016 Atlas Awards - Winners

Entry: Post-A Level Italian Language

Marcella Oliviero, University of Bristol

Andrea Zhok, University of Bristol

Post-A level Italian Language is a first year undergraduate course that uses Xerte as a platform for student groups to create and deliver a grammar lesson on an assigned topic.

The Awards Committee felt this was a wonderful use of project-based learning to increase student engagement and learning outcomes. It demonstrated creative and innovative use of Xerte features that enabled students to create multimedia resources to teach other students. The course used video, and face to face presentation, in addition to text and online activities to take full advantage of Xerte. It also drew on Facebook and Google docs for additional social aspects and collaboration. This course exemplified great use of group work, collaboration, peer and self-evaluation and formative and summative assessment.

Entry: PSY 322 – Social Psychology

Alexander Nagurney, University of Hawaii at Hilo

Patrick Smith, Texas State University

Social Psychology is an undergraduate course offered online through the University of Hawai'i that is based predominantly on Sakai's Lessons tool, but draws on other features.

The Awards Committee felt this was a strong application that combines game-based learning activities, to deliver a course in which the students communicated more frequently, thoughtfully, and collaboratively. The innovative use of a real world problem (hidden within the guise of a 'fictitious client) engages the students in team based problem solving and individual reflection. In addition, the use of Lessons for student-created content allows flexibility and variability in the final project.

Entry: Teaching Introductory Statistics using a Blended Mode of Instruction at the University of Cape Town

Leanne Scott, University of Cape Town

Stefan Britz, University of Cape Town

This is a well-designed blended course that promotes active learning and problem-solving skills for a large introductory statistics class of 1400 students.

The Awards Committee felt this was an excellent example of a blended course making full use of Sakai along with other resources and activities. This course is very innovative in its approach to student learning on a difficult topic and used many different ways for communication and tracking student learning.

Carefully scripted combinations of online and face-to-face resources have clearly energized student engagement. Students were provided with multiple sources of support and results clearly show that learning improved dramatically.

2016 Atlas Awards - Honorable mentions

Entry: Innovative teaching: Using multimodal strategies to engage students in the online learning environment

Jennie de Gagne, Duke University

Haiyan Zhou, Duke University

Population Health is a core course in the master's graduate curriculum of the Duke University School of Nursing, which addresses how evidence-driven decision-making serves to improve health outcomes of populations. This online course, uses Saka as a "flip the classroom" approach for students to gain first exposure to learning materials from the lessons site prior to engaging in weekly activities such as problem solving, discussions, quizzes, peer-assessments, and multi-media projects

The Awards Committee thought this was a well thought out and designed course. Student engagement was clearly evident and encouraged with excellent integration of technology and learning materials using Sakai tools (including lessons, forum, syllabus, tests and quizzes) to deliver an active learning experience that engages students in real-world data activities that brings theoretical concepts to life.

Entry: Massive Flipped Classroom experience using Sakai and Opencast

Carlos Turro, Universitat Politècnica de València

Raul Mangod, Universitat Politècnica de València

The Universitat Politècnica de València (UPV) is a higher education institution that has undertaken a campus-wide "Flip Teaching" deployment of more than 100 courses with around 200 teachers. Sakai Lessons, Opencast as well as studio production videos play a major role in this deployment. Here technology is used to deliver the content and students come to class to discuss the content, and "apply the knowledge previously acquired with the teacher acting as a facilitator and guide."

The Awards Committee felt this was a very interesting institutional innovation and was impressed by what UPV had accomplished. The application showed excellent student engagement with well documented feedback and analysis and clear strategy building on previous pilots. It's clear from the students involved that they are benefitting from this rollout of flipped learning.

8 Apereo Fellows 2016

The Apereo Fellows program seeks to foster community leadership and contributions by recognizing and supporting active contributors. Fellows enrich the community in a variety of ways, including technical expertise, teaching and research practices and community organization, support and leadership. Fellowship awards recognize such contributions and support the efforts of the Fellows with a modest stipend

Matt Clare. Supporting and championing teaching and learning is the sole focus of Matt Clare's career as manager of e-Learning in the Centre for Pedagogical Innovation at Brock University. Matt believes that good teaching and learning requires flexibility and opportunities for collaboration and autonomy, a focus on what works, and for all this to be within a climate of respect. Matt's experience has shown him that open source software is one of the best ways to provide this.

Finding only moderate success at writing code, Matt has instead focused his contributions to open source software on challenges that require people to work together to solve. This is demonstrated through Matt's leadership in the accessibility portfolio in Sakai, Sakai's rA11y (review accessibility) plan, and his commitment to fostering dialogue about accessibility across Apereo.

Wilma Hodges. Wilma is the Director of Training and eLearning Initiatives at Longsight. She has worked with Sakai since 2009. Wilma led the Sakai Documentation Working Group in the re-write of the Online Help for Sakai 10 and served as the conference planning chair for the Sakai Virtual Conference in 2014 and 2015. Wilma has also been actively involved with several community projects, such as the Sakai Showcase webinar series, LEaP (Lessons Enhancement Project), STEP (Samigo Tests Enhancement Project), Apereo FARM (Funding and Resource Management), as well as usability testing and the UX Working Group.

Brian Jones. Brian started working at Western University in 2011, during the summer months when the institution transitioned from a closed sourced LMS to Sakai 2.9.1. He is a member of a 4-person development team responsible for maintaining and developing features for Western's LMS. In the past year, Brian was selected to serve as a member of the Sakai Core Team. He is dedicated to progressing not only Western's institution's flavor of Sakai, but also contributing any and all of his team's relevant work back to the community. Brian takes great pride in knowing that he plays a part in positive and beneficial learning experiences not only for students, faculty and staff at Western, but also in the global Sakai community.

José Mariano Luján. José has been involved in the Sakai community since 2010 when he attended his first Euro Sakai conference in Spain. He works with Sakai at the ICT Area from the University of Murcia. He is also responsible for the technical coordination for a fully online master program which was awarded with a TWSIA Honorable Mention in 2012. He enjoys being involved with the community, always looking for ways to improve it, and trying hard to contribute back most of the work done by the University of Murcia's team. He has participated in many conferences and he has been leading the S2U Team (Spanish Sakai Users) for over 3 years now. S2U is currently one of the most active Sakai teams worldwide. He has played an important role in developing community leadership in Spain and internationally. Over the past few years, he has increased his focus on the release of Sakai 11 becoming more active in many groups like the Core Team, QA, Morpheus, Conference planning, FARM and more.

Jacques Raynauld. Jacques is professor at HEC Montreal where he holds the Chair on teaching and learning technology for management education. He is currently the project advocate for Karuta, a next generation portfolio solution that recently came out of the incubation process (<http://karutaproject.org/>). Besides being a regular contributor the annual Apereo conferences in North America and Europe, Jacques has organized a special ESUP-Portail-Apereo conference in Montreal in October 2015. In the past years, Jacques has been quite involved in the Sakai community where he was a team leader for the project OpenSyllabus which is still used and maintained at HEC Montréal.

Charles Severance. University of Michigan/Longsight. Charles is a Clinical Associate Professor and teaches in the School of Information at the University of Michigan. He is the Chair of the Sakai Project Management Committee (PMC) and works for Longsight, Inc. as Sakai Chief Strategist. Previously he was the Executive Director of the Sakai Foundation and the Chief Architect of the Sakai Project and worked with the IMS Global Learning Consortium promoting and developing standards for teaching and learning technology.

Charles teaches two popular MOOCs to students worldwide on the Coursera platform: Internet History, Technology, and Security and Programming for Everybody and is a long-time advocate of open educational resources to empower teachers.

Charles is the editor of the Computing Conversations column in IEEE Computer magazine that features a monthly article and video interview of a computing pioneer. Charles is the author of the book, "Sakai: Building an Open Source Community" that describes the early days of the open source Sakai project. Charles is also the author of the book, "Using Google App Engine" from O'Reilly and Associates and the book "Python for Informatics: Exploring Information". He also wrote the O'Reilly book titled, "High Performance Computing". Charles has a background in standards including serving as the vice-chair for the IEEE Posix P1003 standards effort and edited the Standards Column in IEEE Computer Magazine from 1995-1999.

Charles is active in media as a hobby, he has co-hosted several television shows including "Nothin but Net" produced by MediaOne and a nationally televised program about the Internet called "Internet:TCI". Charles appeared for over 10 years as an expert on Internet and Technology as a co-host of a live call-in radio program on the local Public Radio affiliate (www.wkar.org).

Chuck's hobbies include off-road motorcycle riding, karaoke and playing hockey.

Charles has a B.S., M.S., and Ph.D. in Computer Science from Michigan State University

9 Apereo Foundation Board Elections

Josh Baron (Marist College), a former Sakai Foundation and Founding Chair of Apereo retired from the Board in 2015. John Lewis and Tim Carroll reached the end of their term and were re-elected. Russ Little (Sinclair Community College) was elected to the board, but subsequently retired due to change of employer.

10 Software Communities

Apereo OAE

The Open Academic Environment is a powerful new way for researchers, students and faculty to create knowledge, share, collaborate and connect with the world. It is a multi-tenant and highly scalable platform that is able to support multiple institutions at the same time.

This year, the OAE project released versions 11.3, 12.0, 12.1, 12.2 and 12.3, in addition to a series of intermediate minor releases. The most significant new features and improvements in these releases include: the ability to invite guest users, integration with Access Management Federations, group profiles and accessibility and internationalization improvements.

OAE has had a significant focus on growth and adoption. The ESUP-Portail deployment in France has seen consistent growth in number of institutions and usage and there is a new deployment available in South Africa.

The *Unity deployment has set up 20,000 tenants for institutions around the world, thousands of which have automatically been configured with institutional single-sign on through the access management federations. *Unity is seeing continuous growth in the number of institutions and users taking advantage of that.

In the next year, the major focus of the project will be on continuing to grow usage and adoption, together with a significant revamp/refresh of the user interface and streamlining of the collaboration features.

Bedework

Bedework is an open-source enterprise calendar system that supports public, personal, and group calendaring. It is designed to conform to current calendaring standards with a goal of attaining strong interoperability between other calendaring systems and clients.

Bedework has remained very active over the last year, and has made three substantial releases in the course of 2015-2016 - 3.10, 3.10.2, and 3.10.3. Key features include a move to Elastic Search, Responsive design for public events, improved workflow for public events administration, and a self-registration system for public events registration. Major performance improvements were a significant feature of each release. Significant contributions have come from Columbia University, which funded several enhancements.

CAS

The Central Authentication Service project, more commonly referred to as CAS is an authentication system originally created by Yale University to provide a trusted way for an application to authenticate.

During 2015-2016 the CAS community has focused on a series of patch releases on CAS 4.1.x and 4.2.x. The project continues work on the next major release that is CAS 5. Perhaps the most significant features of CAS 5 are:

- Support for MFA based on DuoSecurity, Google Authenticator, YubiKey and such
- SAML2 and InCommon metadata support
- OpenID Connect Support

Voluntary contributors have contributed over 200 patches, small and large, to CAS over the past year. These have added support for Apache Ignite, Apache Shiro, Stormpath, Couchbase, and MongoDB. The project continues to be the most popular Apereo project on Github with close to 1000 codebase clones and approximately 1400 bookmarks. CAS welcomes two new committers to the project: Dmitriy Kopylenko and Daniel Frett. Both have an excellent track record with CAS and are heavily involved with project development and direction.

CAS recently produced a community survey to better realize what items should be prioritized on the roadmap. We so far have responses from 150 institutions (some of which do multi-tenant deployments of CAS which indicates the number is much larger than just 150). The feedback has been invaluable and we continue to press on outlined items based on community vote.

Karuta

Karuta is a flexible tool for the incremental prototyping and the diffusion on the web of digital portfolios or eportfolios for various purposes; showcase portfolio, learning portfolio, assessment portfolio.

Karuta has made three releases in the course of 2015-2016: Karuta 1.1, 1.2, and 2.0 (two point releases and one major release). The Karuta 2.0 UI has been completely reworked, is significantly more intuitive, and built around the principles of responsive design. A special Welcome page with images and tips for users is now standard for all portfolios. As in previous versions, Karuta 2.0 can accommodate any type of rubric. In addition, a new multidimensional table-like display can now be used to accommodate AAC&U-type rubrics for speedier grading. Sharing possibilities have been greatly enhanced. As before, users can share any part of their portfolio with colleagues. Requests for feedback are handled using the same functionality. Outside evaluators can now add evaluation ratings and comments without being logged into the system. Users can now create attractive showcase portfolios by adding 1-column, 2-column, and 3-column sections. Within each section, blocks of images, text, documents, and URLs can be added and moved. This approach displays very well on any device.

Report capabilities have been greatly expanded. Report functionality can be used to create tables within a portfolio page, in a student portfolio (dashboard), or across student portfolios within in a particular program. Reports can be used to count artifacts, calculate sums and averages, and can be displayed in different colors or formats. Reports can also be exported in CSV or PDF format.

If desired, the open source social network ELGG can be integrated to Karuta 2.0.

Karuta has significant adoption in the last year. This includes HEC Montréal (affiliated with the University of Montréal), Quebec Training Network in Perinatal Research (QTNPR) - University of Montréal, Archive of Quebec Contemporary Dance (ARC Danse), IUT-2 Grenoble (Institut Universitaire de technologie 2), ESPE Grenoble, Kyoto University Graduate School of Advanced Integrative Studies in Human Survivability, Kyoto University Inter-Graduate School Program for Sustainable Development and Survivable Societies, L'Ecole Spéciale Militaire de Saint-Cyr, France, New Brunswick Theological Seminary, NJ, USA (LAMP)

Opencast

The Opencast community is a collaboration of individuals, higher education institutions and organizations working together to explore, develop, define and document best practices and technologies for management of audiovisual content in academia.

During 2015-2016 Opencast released version 2.0/2.1, with substantial changes to administration, a new video player, archiving capabilities and replacement of Apache Felix by Apache Karaf. During the same period Entwine, a major contributor to Opencast, was acquired by Extron. A crowd-funded "quality booster" community initiative proved successful. Opencast version 2.2 is scheduled for a June 2016 release, with a range of enhancements.

Sakai

Sakai represents a fundamentally different approach to the learning management system. Unlike other "open" systems available today, the direction and feature set of Sakai originates from within higher education to address the dynamic needs of a global academic community. The Sakai open-source community values the participation of its contributors highly, with educators and developers from various institutions working together to turn great ideas into reality for the entire community of Sakai adopters.

There has been renewed interest in Sakai over the last twelve months. The Sakai community has made two maintenance releases, 10.7 and 10.8, with a combined total of 147 fixes and 7 security issues addressed. Sakai source code has seen a 32% increase in commits in the last year, with a 42% increase in contributors, bringing the total to 104.

Sakai 11 will be released in mid 2016. Highlighting responsive design, a redesigned gradebook, enhancements to the Lessons tool, and many more significant improvements. A community-led Sakai marketing group has worked on a redesigned web site for Sakai 11, which is available at www.sakaiproject.org. The Sakai community eagerly anticipates Sakai 11.

Student Success Plan

The open source SSP case management software supports a holistic coaching and counseling model that expedites proactive interventions for students in need.

Student Success Plan saw a major release in 2015-16, with version 2.7 released in October 2015. This release added a variety of features, changes and bug fixes that touched nearly every SSP tool. Major work included a significant addition to internationalization capabilities, improved templates for messages, a new "student challenges" report, and a multi-select option for search criteria. Overall the 2.7 release saw over 40 bug fixes and over 50 new features and improvements.

UniTime

UniTime is a comprehensive educational scheduling system that supports developing 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.

UniTime 4.1 was released in March 2016, following a steady schedule of one release every 15 months. UniTime 4.2 development is well under way, with a planned release in mid-2017. UniTime currently represents around 600,000 lines of code.

Some 58 institutions from 30 countries completed a voluntary registration form during the last year, with a steady growth in interest and adoption globally. Countries where UniTime has been adopted include USA, Czech Republic,

uPortal/uMobile

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 memberships fees from academic institutions, commercial affiliates, and non-profit foundations. uMobile is an open source initiative to bring campus applications, content, and data to mobile devices.

uPortal has continued a significant level of activity over the course of 2015-2016. The uPortal community has made 3 uPortal releases, 28 releases of portlets or other software modules, and 15 angularjs-portal releases. New features included: Updated portlet api (to 2.1), performance improvements, improvements to Portal Admin, Tenant Manager, Marketplace, PAGS, new and updated REST APIs, support for Java 8, support for Tomcat 8, in addition to bug fixes and security patches. Coming months will see moves to mainstream UW-Madison's AngularJS-portal in the uPortal ecosystem.

Xerte

The Xerte Project provides a full suite of open source tools for e-learning developers and content authors producing interactive, and highly accessible learning materials.

Xerte graduated Apereo incubation just under a year ago, and its first year as an Apereo Software Community has been very positive. The Xerte community made three releases: 3.0, 3.1 and 3.2. Version 3.0 was a significant step forward, with a completely new editor and a wide range of other enhancements, over 250 fixes, and large numbers of new features. The release included several new authoring templates, bringing to total to over 60. 'Themes' now make it easy to customize and brand content. The workspace has been completely overhauled, bringing a number of significant usability enhancements. The project now has almost zero dependence on the Flash player for authoring and playback, delivering on the promise of future-proofing content by keeping it separate from the runtime technology. Julian Tenney, Ron Mitchell, Fay Cross, Tom Reijnders, Inge Donkevoort, and John Smith have made significant contributions to the project. Xerte has also become an affiliate member of the Open Source Initiative.

Learning Analytics Initiative

The Apereo Open Learning Analytics initiative has participated in face to face analytics events, and held a number of information sharing calls over the course of 2015-2016. A series of topic themed webinars are planned into the future. The year also saw a significant increase in interest and adoption of the components of the Open Analytics Platform in North America and the UK, where the development of the Jisc national service continues. Dialogue in France suggests significant and growing interest in the platform.

Participants on the LAK Conference Hackathon agreed to develop closer collaboration between face-to-face events. Given the very practical focus of the participants, this has potential to form a very useful meeting point for Apereo, SoLAR and Jisc to deepen collaboration.

11 Events

Apereo, and the communities it represents, organized a significant number of face-to-face and virtual events over the course of 2015-2016. These included -

Open Apereo 2015, Baltimore. Despite serious issues in the locality at peak registration time, around 260 attended Open Apereo 2015 in Baltimore in June 2015 with 125 presenters across four tracks. Open Apereo continued to be a very international event, with attendees from fourteen countries - Canada, China, Colombia, Czech Republic, France, Ghana, Grenada, Jamaica, Japan, Netherlands, South Africa, Turkey, United Kingdom, and United States.

Montreal. Around 50 attended the open source in higher education event organized at HEC Montreal in September 2015. Speakers from both ESUP-Portail and Apereo were well received, and interest was expressed in closer collaboration around open source in higher education in Quebec.

Sakai Virtual Conference. Over 400 attendees from 9 countries attended the second Sakai Virtual Conference in November 2015. The conference drew over 70 presenters in 48 presentation sessions and raised \$13,500 in revenue dedicated to Sakai development. As part of the event, a group conducted Remote UX Testing on Lessons, gave away prizes for the best attendee Rogues Gallery pages and Sakai Trivia contest winners, and announced the winners of the Sakai 11 Skin Contest. A block of sessions in Spanish were integrated into the schedule at an appropriate time for Spanish participants. The day after the event the China Higher Education Information Academy (CHEIA) hosted an online tech-talk about Sakai titled "How to participant in an Open Source community, Sakai as an example" and featured highlights from the Sakai Virtual Conference.

Spanish Sakai (S2U) Meeting: A Spanish Sakai Conference and working meeting was held in Murcia w/c 2nd November. The meeting was well attended - around 50 at the Conference, and 25 at the working meeting.

Paris and Amsterdam Analytics Meetings - Representatives of Apereo participated in meetings in Paris and Amsterdam in December around the theme of learning analytics. The Paris meeting was organised by the Ministry responsible for higher education, MiPNES, and was well attended (75) by senior staff across French higher education. The Amsterdam event was organized by the EU-funded Learning Analytics Community Exchange Project (LACE - <http://www.laceproject.eu/>) and the Universiteit van Amsterdam (UvA), and focused on outcomes of UvA pilot activity in the space.

Sakai Camp. Sakai contributors and supporters gathered in Orlando, Florida, January for the SakaiCamp 2016 working unconference. Sakai Camp 2016 drew attendees representing 13 institutions and organizations, including those from the UK and Spain. Out of the conference came a revitalized focus on QA for Sakai 11 and a new Marketing group to help promote Sakai 11.

Apereo Europe/ESUP Days took place in Paris in the first week of February 2016. This was the first event Apereo and ESUP-Portail have run with an integrated program rather than one day of "Apereo" material, and one day of "ESUP-Portail" material. A small-scale workshop on the Apereo Open Analytics Platform was held alongside the conference. This provided an opportunity for an invited group to become familiar with the platform in more detail than a larger event might allow. The main conference was attended by around 110 over the course of two days. Marie-Françoise Crouzier from the Ministry of Higher Education and Research provided a keynote on Ministry strategic priorities, and how the relationship between ESUP-Portail and Apereo was a key part of strategic plans. Ian Dolphin spoke on "Beyond the Learning Management System - Some Personal Reflections". A range of projects in France and Apereo projects gave presentations. Simultaneous translation was provided on both days. Jacques Raynauld (Montreal) and Eric Giraudin (Grenoble) spoke on Karuta. This presentation attracted considerable attention from the Ministry and others.

Apereo South Africa

Apereo Africa took place on 9th/10th March. Around 100 attended - more than twice the previous best numbers, despite a last minute change of venue. The conference provided significant evidence of a growing and vibrant community, and demonstrated use of Sakai, Opencast, CAS and (at Cape Town) Xerte. Chuck Severance spoke on Sakai, Tsugi and the next generation digital learning environment. Ian Dolphin provided a foundation update, and spoke on the relationship between learning analytics, Apereo software communities and the 'Next Generation Digital Learning Environment'.

OpenCast Cologne Summit, March

Around 100 members of the Opencast community met in Cologne in March. The main topics of conversation at the event were the Opencast 2.2 release, Paella Player 5.0, external/application API (contribution for 2.3) and the Learning Management System plugins that use make use of the API's (Moodle, Ilias, OLAT).

Xerte Conference, Nottingham, April

Around 90 members of the Xerte community met in April at the University of Nottingham. The conference ran three tracks, and there was a particular focus on students as content creators.

LAK/Jisc/Apereo Analytics Hackathon - April

A two-day hackathon organised by Jisc, SoLAR and Apereo began the Learning and Analytics Knowledge Conference in Edinburgh in April. The event had a focus on testing and developing practical interoperability solutions, and was attended by around 60 participants.

Webinars

A series of project and theme-based webinars have been held over the course of the year. A new program begins in September. Suggestions for webinars are always welcome. Please email the Executive Director with suggestions.

**APEREO FOUNDATION
FINANCIAL OPERATIONS REPORT**

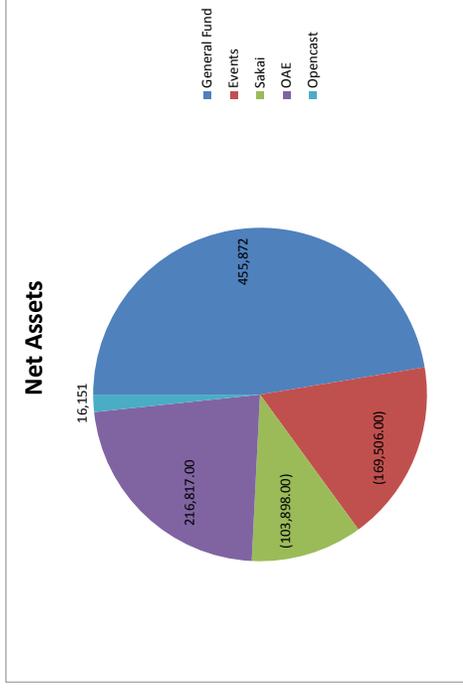
FOR THE YEAR ENDED DECEMBER 31, 2015

Substantially all disclosures required by the income tax basis of accounting are omitted.

STATEMENT OF ASSETS, LIABILITIES AND NET ASSETS	
ACCRUAL BASIS METHOD OF ACCOUNTING USED FOR FEDERAL INCOME TAX PURPOSES	
AS OF DECEMBER 31, 2015	
ASSETS	
Cash and Cash Equivalents	\$ 465,785
Receivables	177,822
Other Current Assets	7,671
Total Liabilities	\$ 235,842
NET ASSETS	
General Fund Balance	\$ 455,872
Events Fund Balance	(169,506)
Sakai Fund Balance	(103,898)
OAE Fund Balance	216,817
Opencast Fund Balance	16,151
Total Net Assets	\$ 415,436
TOTAL ASSETS	\$ 651,278

STATEMENT OF REVENUES, EXPENSES AND CHANGES IN NET ASSETS	
ACCRUAL BASIS METHOD OF ACCOUNTING USED FOR FEDERAL INCOME TAX PURPOSES	
FOR THE YEAR ENDED DECEMBER 31, 2015	
Support and Revenue	Total
Revenue	\$ 591,599
	\$ 183,666
	\$ 95,082
	\$ 363,160
	\$ -
	\$ 1,233,507
Total Support and Revenue	\$ 591,599
Operating and Supporting Expenses	Total
Labor Expenses	\$ 225,712
Facility and Equipment	87,489
Travel	19,854
Continuing Education	50,574
Administration Expenses *	9,359
Legal Expenses	142,342
	3,016
	9,778
	-
	-
	66,673
	6,870
	954
	295
	1,600
	-
	24,151
Total Operating and Supporting Expenses	\$ 415,969
Change in Net Assets from Operating Activities	\$ 175,630
	\$ (103,610)
	\$ (117,477)
	\$ 106,204
	\$ (10,000)
	\$ 50,748
Non-Operating Activities	Total
Interest Income	\$ 60
Other Income	-
Interest Expense	-
Foreign Currency Gains and Losses	(1,357)
	1,451
	(273)
Change in Net Assets	\$ 174,333
	\$ (102,159)
	\$ (117,477)
	\$ 105,931
	\$ (10,000)
Net Assets at beginning of year	\$ 281,539
	\$ (67,347)
	\$ 13,579
	\$ 110,886
Net Assets at end of year	\$ 455,872
	\$ (169,506)
	\$ (103,898)
	\$ 216,817
	\$ 16,151
	\$ 415,436

No CPA has audited, reviewed, compiled or expressed any assurance on these financial statements.



** Unrestricted Funds include: General, Events and Sakai

	General	Events	Sakai	OAE	TOTAL
* Administration Expenses					
Credit Card Fees	49	4,171	-	-	4,220
Bad Debts	-	-	-	-	-
Office Supplies	834	1,078	-	-	1,912
Shipping	-	-	-	-	-
Bank Fees	8,820	41	800	-	9,662
Dues and Subscriptions	5,247	-	-	-	5,247
Miscellaneous	7,584	1,580	154	295	9,612
Insurance	3,574	-	-	-	3,574
Licenses and Permits	-	-	-	-	-
Accounting	40,565	-	-	-	40,565
Other	-	-	-	-	-
TOTAL	66,673	6,870	954	295	74,791