



## Aperero Newsletter

June 15, 2013

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## Announcements

### 1. Aperero Affiliates to Open Source Initiative

Aperero was formed both develop open source software in the service of higher education, and to advocate the use of such software and its benefits. As such, we recognize that higher education is not an island. Our work is intimately connected with

broader open source communities, and we need to establish meaningful and mutually beneficial relationships with such communities as we continue to develop our work. To this end, Apereo recently applied for affiliate status with the Open Source Initiative. The application was approved by the OSI Board.

The Open Source Initiative (OSI) is a non-profit corporation with global scope formed to educate about, and advocate, for the benefits of open source, and to build bridges among different constituencies in the open source community. It is the steward of the Open Source Definition (OSD) and the community-recognized body for reviewing and approving licenses as OSD-conformant.

Ian Dolphin, Executive Director of the Apereo Foundation, said "Apereo relies on work undertaken by the OSI. The affiliation is a mark of our support and recognition of this work. Both parties will explore practical ways of working together into the future."

More information about the Open Source Initiative (OSI) can be found at <http://opensource.org/history>.

## 2. Apereo Board Strategy Workshop -- Summary of Outcomes

The Apereo Foundation board met at New York University on April 16-17, 2013 with the objective of identifying sustainable strategies to deliver the Apereo vision of a "common foundation" in the context of the current and developing global higher education landscape. David Kay of Sero Consulting was invited to facilitate the event, including undertaking preparatory interviews with board members and supporting the Chair and Executive Director in documenting findings and outcomes.

Six key areas of discussion will be of interest to Apereo members and other stakeholders who have an interest in the potential of IT and digital technologies to advance global higher education. The first of these areas reflects discussion and deepening understanding of the nature of Apereo itself, and the role of the board within the organization. This is a necessary prerequisite and context for the further elaboration of a strategy for the Foundation, and an approach designed to deliver against the objectives of that strategy.

### - The Role of the Board

Apereo is a network of organisations that share common needs, ambitions and values. The board acts as a key enabler within this network. It is the "glue" that adheres crucial points of connection between Apereo and its constituents -- the range of projects, interest groups and regional communities that Apereo comprises. It is also a critical facilitator of relationships with other organisations. The Board therefore has a multi-dimensional role: as a catalyst, encouraging effective internal and external connections within and without

the Apereo network; as a collective strategist, ensuring informed alignment of the goals of Apereo with the needs of global higher education; as an agency of check and balance, ensuring prudent and effective use of foundation resources in realising objectives.

#### - The Need for Targeted Advocacy

Whilst there is greater acceptance of the value of open source software in higher education than there once was, the sector still lags behind others in understanding and appreciation of benefits. This understanding is also uneven. There is greater understanding, for example, of the role of open source licensing and IPR management in reducing consortial friction -- by providing an independent entity in which to vest IPR -- than there is of open source approaches to software development and coordination. In line with its mission, Apereo must work with other organisations to demonstrate the value of open source software in education, and particularly in areas that are intimately connected with mission delivery -- learning, teaching and research.

#### - The Landscape

A complex ecosystem of grounded and sustainable software solutions is increasingly critical to the Higher Education community, the expectations of its learners, educators and researchers, and by its institutional ambitions. This is of particular importance at a point where higher education faces the challenge of constricting resources accompanied by demand for operation at significantly increased scale. Unless the solutions to these challenges are open, their value to higher education will decrease over time, as the issues of control, lock-in and migration re-occur. The board identified a number of potential points where investment and effort by the Apereo community might begin to address this. In the coming period, the board will work with the community to systematically investigate these opportunities, including new resourcing models for projects, whilst recognizing the continued responsibility to delivering support for existing committed projects and communities.

#### - The Apereo Portfolio

The sustainability of the foundation and the health of the network Apereo represents is dependent on considered innovation and growth. The board recognized the importance of building the Apereo portfolio in terms of membership, adoption, and contribution; balancing the attractions of breadth and scale with the core values of quality, contribution and community. Growth should, however, be built on solid foundations. In the coming period, the board will facilitate community review of the Apereo portfolio, ensuring that each project is appropriately represented and promoted in communications, that governance structures are in place which are demonstrably effective for each project and community, and that focal points of potential future common strategic investment are discussed within the broader community.

## - The Software Community Lifecycle

Software and other communities brought forward, incubated and sustained by existing and new members are the lifeblood of the common foundation. Apereo must provide a firm yet flexible framework to support the software lifecycle that combines local governance and informed self-assessment with strategic guidance and value-added support from the foundation. The current review and reiteration of an incubation process is the first step towards articulating the flexible framework we require. When this concludes, during July and August, the community will begin to address further areas of the product lifecycle in detail.

## - Communication and Community Coordination

In order to nurture both community and opportunity, the board must prioritize working with members, partner organizations worldwide and core staff to establish realistic yet compelling approaches to partnership, outreach and communications. This activity will add value to the efforts of projects as well as to the overall reputation of the foundation. More effective communications and community coordination are key priorities for the immediate future. These will be supported by further rationalizing infrastructure, consideration of new ways for member organisations to share experience and form new initiatives, and by additional staff as soon as this is judged prudent.

In continuing to work to strengthen the foundation in these ways, we will not lose sight of the foundation's mission; in the next period there will be renewed focus on support for projects and their promotion -- the very point of the foundation's existence.

These areas present key challenges that will focus board attention as ongoing priorities for 2013.

Ian Dolphin  
Executive Director, Apereo Foundation  
ian.dolphin@apereo.org

## 3. Open Apereo 2013 Conference Sessions on the Apereo YouTube Channel

Are you disappointed because you couldn't attend the Open Apereo 2013 conference? The Apereo Foundation is offering recordings of several of the enriching presentations and birds of a feather discussions, including the welcoming speech and keynotes, through the Apereo YouTube Channel, [www.youtube.com/user/apereo](http://www.youtube.com/user/apereo).

#### 4. Apereo Advisory Board Forming -- Candidates Needed

As a project-oriented foundation, Apereo puts much of its collective energy into meeting the immediate needs of its participants. This is as it should be. But sometimes this causes us to miss the forest through the trees, focusing on what campuses need in the next release at the expense of seeing the big picture and finding opportunities to grow the community. In response to this challenge, the Apereo Foundation Board is forming an Advisory Council consisting of leaders in academic institutions that are not active participants of Apereo projects -- or even adoptees of Apereo projects -- but are interested in and sympathetic to the foundation's mission.

The council will provide two kinds of help. First, it will review foundation projects and activities at a high level and offer an outsider's perspective on them, answering questions like,

- How do the foundation's projects and activities align with greater needs the council members see in the educational community?
- Who, in the broader academic community, needs to know about particular projects but probably doesn't know about them, and how can those people be reached?
- What complementary projects and activities could the foundation be taking on that would attract new members or offer new value to existing members?

Second, the council will help with outreach, mostly by simply being the influential people that they are with a heightened awareness of what Apereo does.

We are looking for good candidates to participate on the council. Presidents, Provosts, CIOs, and CFOs are all welcome. The group conversations will not be primarily technical; rather, they will be focused on how the Apereo projects and community can better support the academic mission. Meetings will be two to four times a year, with one being face-to-face at the Apereo conference and the remainder being virtual. We are interested in developing a group that is diverse in every sense, including but not limited to academic role, type of institution, nationality of the home institution, gender and race. Most importantly, we are looking for people who are thoughtful, generous of spirit, and capable of giving good, honest advice.

If you can suggest anyone who would be a good candidate for the council, please contact Ian Dolphin ([ian.dolphin@apereo.org](mailto:ian.dolphin@apereo.org)) or Michael Feldstein ([michael@mindwires.com](mailto:michael@mindwires.com)).

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## Projects

### 5. University of Michigan ITS Teaching & Learning Group Co-Develops New Software Evaluation Method

Recently the U-M ITS Teaching & Learning Group (T&L) teamed up with staff from CRLT (Center for Learning and Teaching) for the first ever "Rapid IT Evaluation." The goals of this new type of evaluation are to capture faculty insights on the pedagogical value of emerging technologies and streamline the process of making the right tools and capabilities available to support teaching and learning.

For this first event, the 17 faculty attendees evaluated Sakai's LessonBuilder, a CTools module that allows instructors to set up a "lesson" for efficiently accessing materials and features in CTools in one or more learning sequences. For example, with LessonBuilder, students can easily jump from a syllabus in the Syllabus Tool to an assignment in the Assignments Tool to materials in Resources without having to open each of these tools individually.

The attendees represented a broad cross-section of the university: six LS&A departments and eight schools, including the Medical School, Engineering, Business, and others. After an introduction, the faculty members performed specific tasks on their laptops using pre-populated CTools sites. CLRT and T&L staff observed but refrained from helping in order to more accurately gauge the usability of the software and the areas of confusion. This was followed by small group discussions about what the faculty liked and what could be improved, a large group question and comment section, and finally written feedback in which, among other things, faculty were asked to share ideas of how other faculty in their departments might use LessonBuilder. The entire process took under two hours.

Directly after the session, several refinements were made to LessonBuilder that will be shared with the Sakai Community. They will also be shared with the same group of faculty to demonstrate the results of their participation. Given the open source nature of CTools, UM developers can adapt tools like LessonBuilder to meet specific instructional requirements based on faculty feedback.

CRLT, the Library, and the T&L Group plan to use the Rapid IT Evaluation protocol in the future to ensure that new offerings meet the needs of the users as closely as possible.

The event was sponsored by the Collaborative Domain Group, a combined advisory group convened by the Knowledge and Teaching & Learning Domain Stewards (Paul Courant and Deborah Ball, respectively). For questions or further information, contact Anthony Whyte ([arwhyte@umich.edu](mailto:arwhyte@umich.edu))

## 6. Research into Effective Site Templates

"Derivation of Electronic Course Templates for Use in Higher Education"

Abstract -- Lecturers in higher education often consider the incorporation of web technologies into their teaching practice. Partially structured and populated course site templates could aid them in getting started with creating and deploying web-based materials and activities to enrich the teaching and learning experience. Discussions among instructional technology support staff and lecturers reveal a paucity of robust specifications for possible course site features that could comprise a template. An attempted mapping from the teaching task as understood by the instructor to the envisaged course website properties proves elusive. We conclude that the idea of an initial state for a course site, embodied in a template, remains useful and should be developed not according to a formula but with careful attention to the context and existing pedagogical practice. Any course template provided for the use of lecturers should be enhanced with supporting instructions and examples of how it may be adapted for their particular purposes.

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This abstract is from a paper written by Jill Fresen, Fawei Geng and Robin Hill, that was published in the "Journal of ALT: Research in Learning Technology" at the end of last year. Adam Marshall ([adam.marshall@it.ox.ac.uk](mailto:adam.marshall@it.ox.ac.uk)) posted this abstract on the WebLearn Blog, <http://blogs.it.ox.ac.uk/adamweblearn/2013/01/research-into-effective-site-templates/>.

## 7. Newframework has Landed

I'm pleased to announce that the "newframework" branch, which has been used as a development branch for the new UI, has finally landed and has been merged into master. This is a significant step, indicating that the main focus in the coming weeks will be increasingly on stabilisation and bug fixing, targeting a first release of this new code base by July 1.

This also means that any pull request can from now on be submitted against the "master" branch.

Kind regards,

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## Community

### 8. New to Sakai -- Universidad Juárez del estado de Durango

Hi Community!

I'm happy to tell you that we have a new University in Latin America with Sakai. The UJED (Universidad Juárez del Estado de Durango in México) is working with Samoo to be in production very soon.

Each day the Latin American community is growing and I'm sure in the next years there will be an "explosion" of Spanish Sakai's all over America. Thanks to all for your efforts in 18n and 110n. This makes it easier for all of us.

Diego del Blanco Orobítg

Apereo LATAM Representative  
diego.delblanco.sakai@gmail.com

### 9. Webinar -- Enhance Student Success with New Features in SSP

When: June 26, 2013, 2 p.m. EDT (GMT -4)

Institutions are seeking ways to target student populations and help them succeed. In this webinar, learn from Russ Little, Project Director, Student Success Plan (SSP), on how SSP impacts student success. This webinar will discuss the latest SSP release, 1.2, and the My Academic Planning tool, MAP (available in SSP 2.0 later this year). Learn more and register at <http://www.unicon.net/ssp-webinar>

Lisa Di Pietro  
ldipietro@unicon.net

## 10. April's uPortal Community Call is Now on SlideShare!

If you missed the last uPortal Community Call in April, the recording is now available through SlideShare at <http://www.slideshare.net/uportal> .

The community call covers general uPortal and Portlet updates, including Tomcat 7 support, the bundled calendar portlet and additional statistics reports. Drew Wills discusses the new Notifications portlet enhancements and Eric Dalquist demonstrates the University of Wisconsin-Madison's portlets integrating with their employee HR system (PeopleSoft).

If you have ideas for future calls or would like to demonstrate some of your portal functionality, please email [uportal-steering-committee@lists.jasig.org](mailto:uportal-steering-committee@lists.jasig.org).

Sincerely,

The uPortal Steering Committee