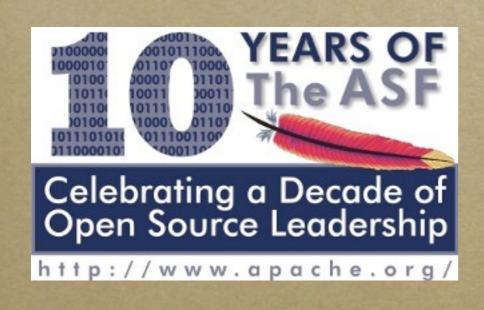
The Apache Software Foundation: No Jerks Allowed!



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Why should I pay attention?

- Committer to Apache HTTP Server, APR,
 Subversion (just graduated!), and Serf
- o President, The Apache Software Foundation
- o Ph.D. from Univ. of California, Irvine
 - o Computational REST (next-gen web arch.)
 - o http://www.erenkrantz.com/CREST/
- o CTO, Project WBS

Open Source & Me

o Started contributing to Apache HTTP Server in early 2001...







Apache Top-level Projects

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|---|---------------------|--------------------------|--|--|----------------------------------|
| | Abdera | CXF | James | POI | Tiles |
| | ActiveMQ | DB (Derby) | Lenya | Portals | Tomcat |
| | Ant | Directory | Logging | Qpid | Turbine |
| | APR | Excalibur | Lucene | Roller | Tuscany |
| | Archiva | Felix | Maven | Santuario | UIMA |
| | Axis | Forrest | Mina | ServiceMix | Velocity |
| | Buildr | Geronimo | MyFaces | Shindig | Wicket |
| | Camel | Gump | ODE | Sling | Web Services |
| | Cassandra | Hadoop | OFBiz | SpamAssassin | Xalan |
| | Cayenne | Harmony | OpenEJB | STDCXX | Xerces |
| | Click | HC | OpenJPA | Struts | XML |
| | Cocoon | HTTP Server | OpenWebBeans | Subversion | XMLBeans |
| | Commons | iBATIS | PDFBox | Synapse | XML Graphics |
| | Continuum | Jackrabbit | Perl (mod_perl) | Tapestry | and Incubator |
| | CouchDR | Intronto | Divot | TCI | nodlings |

Apache's tagline

We are more than a group of projects sharing a server, we are a community of developers and users.

Committer geographic diversity



http://people.apache.org/map.html

Challenges and advantages arise from this!

Project Diversity in Apache

- o Seventy top-level projects (TLPs)
 - o Java, C, C++, Perl, etc. projects...
- o It's okay for projects to be in "same" space
 - o Ant/Maven, Pig/Hive, Axis/CXF...
- Over thirty projects currently in "pipeline"
 Apache aims to provides a pragmatic
 non-technical framework to its projects

Apache's mission

The Apache Software Foundation provides support for the Apache community of opensource software projects. The Apache projects are characterized by a collaborative, consensus based development process, an open and pragmatic software license, and a desire to create high quality software that leads the way in its field.

Apache's mission (redux)

- o Let developers focus on what they do best: code. Foundation exists to do rest.
- o "The Apache Way"
 - o Open development vs. open source
 - o All technical decisions about a project are made in public (mailing lists)

Indirect financial support

- o Apache does not pay for development
- o Many (not all!) developers are paid by a third-party to work on the project
 - o Participate in Google Summer of Code
- o Foundation bears indirect support costs
 - o Infrastructure, publicity, etc.

Motivations & Business Models

- o Each contributor has own motivations
- o Seeking help from others on a big project
- o Commercial support: who to call at 2am?
- Common/shared platform: value add on top of Apache products
- o ...or it's fun/interesting/challenging!

Leaders? We don't need leaders!

- o "Apache" and our feather logo refer to the Native American Apache Nation (Inde tribe)
 - o Not really "A Patchy Web Server"
- o Whomever has the best idea "leads"
- o ...until a better idea is presented to the group and then that person "leads"

"Meritocracy in Action"

- o meritocracy: power distributed based upon demonstrated talent
 - o Young's Rise of the Meritocracies (1958)
 - o Negative connotations...but...oh well!
- o Duncan's "Rules for Revolutionaries" dives into the operational aspects seen in Apache

http://incubator.apache.org/learn/rules-for-revolutionaries.html

Founding of Apache

- o Started as "Apache Group" (8 members)
- o Resumed work on NCSA httpd in Feb. 1995
 - o UIUC put httpd in public domain, but essentially abandoned it
 - o Chose permissive licensing (more later)
- o Informal corporate structure until...

Creation of Foundation

- o Incorporated with 21 members in 1999
 - o ~2,300 committers, 274 members, and 52 emeritus members today
- o Membership-based organization
- o IRS 501(c)3 public charity status
 - o Donations by individuals tax-deductible

Organization of ASF

- o Each Apache project is independent
- o Grouped as 'top-level' PMCs (TLP)
 - o Board: Social not technical guidance
- o Some TLPs have 'sub-projects'; discouraged
- Karma in one PMC doesn't grant rights in another PMC earn karma independently!

Relationships between projects

- o HTTP Server and Tomcat connect via AJP
- o Subversion and HTTP Server use APR
- o Commons logging API supports log4j
- o Tika uses POI for extracting OOXML/ODF
- o Sling uses Jackrabbit for content storage
- o Synapse uses Axis for SOAP bindings

Board of Directors

- o Elected yearly by membership
- o Shane Curcuru (IBM), Doug Cutting (Cloudera), Justin Erenkrantz (Project WBS), Roy T. Fielding (Day), Jim Jagielski (VMWare), Geir Magnusson, Jr. (Gilt), Brian McCallister (Ning), Brett Porter (G2iX), Greg Stein (Independent)

Executive Officers and Staff

- o Exec officers appointed by Board (unpaid!)
 - o Chairman, President, Secretary, Treasurer, Executive Vice President
- Chairman and President typically split external visibility roles; Chairman responsible for Board; President oversees day-to-day operations

Hardware Infrastructure

- o Bulk of work done by volunteers
 - o If a project wants it, they must volunteer!
- o 2 paid system administrators fill "holes"
- o Main data centers: OSU OSL, SURFnet (.nl)
- o Build farms at Traci.net and Yahoo!
- o Off-site backups at UC Irvine

Other Committees

- o ConCom: ApacheCon and smaller events
- o Legal: work w/EFF, SFLC, & Larry Rosen
- o Publicity: Deal with press/outside world
- o Brand Management: Trademarks/licensing
- o Fundraising: Sponsorship program

Budget

- o 2009-2010FY Budget (May 1 April 30)
- o Projected income: \$540,000
 - o Rely upon public and corporate sponsors
- o Projected expenses: \$404,000
 - o Biggest expense is infrastructure: \$150k
 - http://www.apache.org/foundation/records/

ASF Sponsorship Program

- o Platinum (\$100,000 per year)
 - o Yahoo!, Microsoft, Google
- o Gold (\$40k/yr): HP, Facebook
- o Silver (\$20k/yr): VMWare, Progress (IONA)
- o Bronze (\$5k/yr): AirPlus International, BlueNog, Intuit, Joost, Matt Mullenweg, Two Sigma Investments

Contributions

- o Apache wants voluntary contributions
 - o Not copyleft!
- o Many forms of contributions
 - o evangelism, bug reports, testing, documentation, code, design feedback
- o Contributing is easier than you think!

Where decisions happen

- o Can't kibitz in the morning over coffee
- o First time meet face-to-face is at events
- o Mailing lists are the pulse of the project
 - o IRC, AIM, Jabber, etc. not for decisions
- o Roy's mantra: "If it doesn't happen onlist, it didn't happen."

Finding that list!

- o Should be listed on every project's site
- o dev@ dev-to-dev discussions (primary list)
- o commits@ automated source changes
- o users@ user-to-user help (optional)
- o http://mail-archives.apache.org/mod_mbox/

Scoping contributions

- o Do not do "powerplant" contributions
 - o Large changes are hard to review
 - o Break patches up into small chunks
- o Before starting large changes, email plan to developer list - explain how and why
- o Try to get feedback early and often

Voting

- o Vote on releases, code, and ideas...
- 0 + 1? -1? +0? -0?
- o "Binding" vote given to committers
 - o Everyone should feel free to vote
- o Cast your vote on-list
- o ...what about vetos?

The dreaded -1 (veto)

- o Power given to all committers to absolutely stop an action
- o Code can be vetoed releases can not
- o Some projects have an 'override'
- Vetos should only be cast as a measure of last resort; use judiciously!!

Rule of 3 and 72

- o 3 voters is minimum acceptable quorum
 - o Ensures diversity and true community
- o 72 hours minimum time frame for votes
 - o Accommodate long weekends too
 - o Generally err on side of caution

Apache commit policies

- o RTC Review then Commit
 - o At least 3 +1s; no vetos
- o CTR Commit then Review
 - o Lazy consensus assumed okay
- o Different policies per PMC or codebases
 - o Stable: RTC, Trunk: CTR

Invitation of Commit Access

- o Current PMC member nominates individual
- o Discussions on private@ list
 - o Key?: Do we trust this individual?
- o PMCs free to set own bar
 - o HTTP Server: ~6 months of contributions
 - o Subversion: 1-2 months of contributions

No Jerks Allowed!

"How Open Source Projects Survive Poisonous People (And You Can Too)" by Ben Collins-Sussman and Brian Fitzpatrick

http://video.google.com/videoplay?docid=-4216011961522818645

- o Most people are nice; there are dingbats, or may just be someone having a bad day
- o Trolls exist...don't feed them.
- o Don't become a poisonous person.

Legal framework

- o ASF philosophy is that code can be used commercially without restrictions
 - o Just don't call it Apache Foo!
- o Apache License, version 2.0
 - o Grants copyright and patent licenses
- o Many non-ASF projects use ALv2 now

Incorporating third-party code

- o ALv2 is GPLv3-compatible can be used by GPL projects but no GPL within ASF
- o http://www.apache.org/legal/3party.html
- o http://www.apache.org/legal/resolved.html
 - o List of licenses permitted / disallowed
- o Questions to legal-discuss@apache.org

What am I signing?

- o Contributor License Agreement (CLA)
 - o Gives ASF 'license' not ownership
 - o Required before getting SVN account
 - o Fax or email to secretary@apache.org
- o Corporate CLA form when needed?

Growth of Foundation

- o Started with just HTTP Server in 1995
- o Felt there was something repeatable
- o Today, we have over 70 top-level projects
- o It took over 15 years to get there...
- o ...but it wasn't smooth...

Jakarta "Foundation"

- o Jakarta: "umbrella" for all Java efforts
 - o Successful as a brand in its own right
- o Tomcat, Ant, Struts, etc.: great innovation
- o Started to copy foundation org structures
 - o "Mini"-board...but problems arose...
 - o Avalon: who was responsible?

Importance of Oversight

- o Jakarta issues led to a lot of navel-gazing
- o Ultimately agreed upon an extremely flat organizational structure: umbrellas are bad!
- o So, we killed Jakarta: spun-off projects
- o Board requires all projects to submit reports each quarter: by far, most important thing that Board does in our monthly meetings.

Let a thousand flowers bloom

- o Grassroots: interesting projects welcomed
- o Board doesn't say "We want X", instead developers say "We think X is cool"
 - o Helped keep us at forefront of innovation
- o Community support is essential we are not interested in "solo" projects, but how can we help create a viable community?

Starting new Apache projects

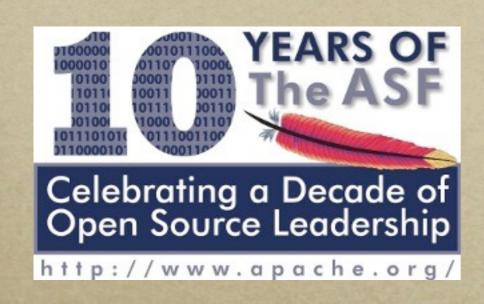
- o Incubator "podlings" can be nominated and eventually "graduate" to be a PMC
 - o Needs foundation member to mentor
 - o Usually legal and/or community issues
- Labs once you are a committer, you can have a sandbox (shared mailing list, no non-committers, no releases)

Community departure?

- o What happens when the community leaves?
- o Unable to muster 3 votes for a release...
- o ... no active committers...
- o ...or fail to report to Board
- o Move project into "Attic"
- o No one has returned from attic...yet.

Beyond a committer...

- Once you are committer, you can then become a PMC member, foundation member, Director...even President!
- You can nominate other foundation (or PMC) members; can serve as mentor for Incubating projects; vote for Board.
- o Maybe you too can then give this talk!



Thanks! Questions?

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Other Recommended Resources

- o Producing OSS
 by Karl Fogel http://producingoss.com/
- Getting Started in Open Source: An Overview for Newbies by Leslie Hawthorn and Cat Allman (at SCaLE 7x and OSCON 2009)
 - o http://scale7x.socallinuxexpo.org/sites/scale7x.socallinuxexpo.org/files/ SCALE_Final_allman_lhawthorn.pdf