Kuali 2.0 Blog

Kuali is entering our second decade and we're innovating again. **Here are the details**.

The more things change, the more they look the same… with additions

Posted by: Brad Wheeler   August 27, 2014

It's been a busy few days for Kuali following our community call on 22 August and the related **blog posts**. The text of that call is available **here**. As we enter our second decade, our focus is to enable greater **Speed**, a path to a complete **Suite**, clear **Sustainability** for all products, and a **Sweet** user experience – the 4 S's.

For those who were unable to attend either of the two Kuali Community Strategy Sessions in June or July, it is not surprising that the necessary shorthand of news stories and tweets can only convey part of the path forward. We've seen some egregiously wrong headlines, and we are grateful that the media has corrected those when we've asked. We'll continue to update the FAQ and this blog as our second decade develops, but I want to get to the heart of some questions that we have heard and get more specific about how things will change or stay the same.

What Stays the Same?

- The Kuali Foundation will continue as a not-for-profit, membership-based entity.
- Kuali software—in the future like in the past—will be available Open Source. Colleges and universities can download, use, and modify the Kuali open source software.
- Kuali software will continue to be designed and tailored to the needs of higher education.
- All software that has been released under the current, **Open Source Initiative** approved Educational Community License (ECL) will and can continue under that license.
- The Kuali Foundation will continue its role to provide Assurance that the code for Kuali software is available as open source, and we'll increase that commitment for the community with code escrow arrangements (e.g., Iron Mountain).
- The Kuali Foundation has long been a very lean, lightweight coordinating entity for the investments and decisions made by its members in various software projects. The Foundation hasn't played the role of deciding to launch new projects or set investment levels in projects. Those have long been the purview of each project's (e.g., Financial System, Research Admin, Library) boards of university investors as they prioritized uses of their funds. The Foundation has played an increasing role to enable some cross-project work for middleware and shared services through initiatives such as the focus on "portfolio-ness" in recent years. What stays the same is that the Foundation won't be making decisions for individual project investments from groups of institutions (see next point) or product investments at the commercial entity (see below). The Foundation is continuing to advocate for and enable efficiency and effectiveness across the portfolio of all Kuali systems for higher education. That will include how current work bridges to new products over time.
- The Foundation will continue as a place that enables groups of Kuali members to aggregate their resources, set priorities for the uses of those resources, and fund software

development of features and enhancements that are important to them. Like today, that work may get done by software engineers at local campuses, possibly sourced to a commercial entity (as was done with the OLE Library system), or sourced to the Kuali commercial entity if the investors choose to do so.

- Developers at colleges and universities may develop some enhancement to Kuali code and submit it for review and consideration to be committed into software releases.
- Commercial firms can continue to be members of the Kuali Foundation and part of the Kuali ecosystem.
- Colleges and universities can procure implementation support, migration, and advising from a range of firms in or outside the Kuali ecosystem.

What Changes?

- The Kuali Foundation is adding a for-profit, Professional Open Source commercial entity to its ongoing role.
- Over time, colleges and universities will have additional options for consuming the suite of Kuali software than they do today. The Kuali commercial entity will offer hosted, Software as a Service (SaaS) applications for institutions that buy off-premises applications across the full Kuali suite of offerings. For those who prefer to operate locally hosted systems, they can download the open source, freely available Kuali software and continue to do so.
- The commercial entity will be an additional means for up-front capital investment to create and enhance Kuali software for both the current Kuali systems for on-premises/SaaS, and also to develop additional native cloud-scale applications for the future. It will grow a software development shop that can accelerate application development through efficient practices.
- The commercial entity is being structured in a way that enables some of the very good things that commercial entities can empower when financed by patient capital rather than beholden to quarterly returns of unaffiliated owners.
- To the extent that university investors in specific projects wish to aggregate their resources to achieve certain software outcomes, they can continue to do so through the means described above. To the extent that capital investors—quite likely university foundations and other sources of patient capital—invest in software enhancement to serve higher education, the broad audience of 3,000+ institutions of all sizes also gains a new voice in feature requirements. Collectively, these dual approaches enhance the Kuali software for all.
- The software license for work done by the new entity and from its own capital will be the *Open Source Initiative* approved Affero GPL3 license (AGPL3). The prior Educational Community License is fully compatible with a move to AGPL3 for future modifications. This is also true for many widely used open source software licenses (e.g., Apache).

- The AGPL3 is widely used for cloud-scale software. It means that anyone can download and use all Kuali software for a local implementation, modify it, and mix it with other local code—the same as with ECL. If the code is used on a server to offer SaaS to others, then any software modifications have to be shared back to the community. This is already the dominant practice among Kuali members.

There will be a time of evolution between how each of the Kuali projects work now and how they may choose to work with their investments in the future. Many of our institutions have Kuali systems doing essential work for university needs, and we'll continue to ensure that they move forward per the priorities of their project boards. Some staff who have worked on Kuali projects as their institutions were project investors will very much continue in that role, and some may evolve to local institutional priorities over time. At Indiana University, I've now met twice with our teams who are involved with Kuali work to discuss those very points. I expect that the blend of direct institutional investment in Kuali projects and investment through the commercial entity will evolve with natural synergy over time and in different blends and pace for each project.

Kuali was created to give colleges and universities options to significantly reduce the costs of their essential big administrative systems. It began with that mission in 2004, and over the last decade has demonstrated some clear outcomes of keeping more higher ed money in its mission for many adopting institutions. Kuali innovated in its founding to blend elements from traditional open source projects, including Linux and Apache, and also elements from directed software development that were essential for complex administrative *Application* software.

The Kuali mission continues into its second decade. Technology is evolving to favor cloud-scale software platforms in an era of greater network bandwidth via fast Internet2 connections and shifting economics for higher education. The addition of a Professional Open Source organization that is funded with patient capital from university interests is again an innovation that blends elements to help create options for the success of colleges and universities.

Continue with us in this journey to Kuali's second decade as all the alternatives for essential big systems are not without their own costs and challenges as well. As a community, we can certainly hope that the next decade of big system transitions for higher education won't cost another $5 billion **as estimated by Kvavik and Katz in 2002**.

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