

## Phases of Engagement:



1. **Maturity Assessment**
2. **Sustainability Workshops and Financial Modeling**
3. **Custom consulting engagements**

\*OSC developed guidebook available for white label use

The Open Source Center's advisory team provides open source projects with a menu of consulting services. We recommend that open source projects start with a short free assessment against the OSC's maturity checklist. After this, we have developed a sustainability guide and a series of workshops that can be used to identify actions the project can take to increase their impact, scale, accessibility, and financial sustainability. The final report from the workshops will include a financial model and list of recommended actions. Some of these recommendations can be accomplished through a custom consulting engagement with the OSC team. Each engagement can be customized in conjunction with the client team.

The services have been created to address common pitfalls faced by projects, and this list is organized to reflect the broad service themes: technical, community, legal/IP, sustainability. In addition, each service theme is broken down in the following areas: advising & mentorship, direct assistance & professional services, tactical grantmaking, and partnerships.

# Legal/IP Services

Area:	Purpose:	Services offered:
<b>Advising &amp; Mentorship</b>	<ul style="list-style-type: none"> <li>• License and IP Planning: (understanding the right license)</li> <li>• Financial and Asset Stewardship: strategy and tactics for budgeting under legal status</li> <li>• Product Management: maintain product feature backlogs and release processes</li> </ul>	<ul style="list-style-type: none"> <li>• Understanding the licenses</li> <li>• Recommending the right licenses: conducting assessment/interviews, research, write-up/discuss results (20 hours)</li> <li>• Recommendations for complicated, multi-product communities or with planning from existing license/ trademark transitions (40 hours)</li> <li>• Development of strategy for budgeting, fiscal planning, fundraising</li> <li>• Planning for financial distribution between community members</li> <li>• Current state evaluation/ research /interviews, documentation/ recommendations, presentation/ Q&amp;A</li> </ul>
<b>Direct Assistance &amp; Professional Services</b>	<ul style="list-style-type: none"> <li>• Support for project's legal and governance infrastructure</li> <li>• Preparing projects for IP</li> <li>• Formulate appropriate strategy for stewardship of IP.</li> </ul>	<ul style="list-style-type: none"> <li>• Considering contributions from others (code, documentation, etc.) via OSI/FSF licenses, copyright assignment, etc.</li> <li>• Review of alternatives and advice for a project's current and future, to ensure an appropriate strategy for stewardship of IP and other tangible and non-tangible assets.</li> </ul>
<b>Tactical Grantmaking</b>	<ul style="list-style-type: none"> <li>• Fiscal sponsorship for legal home</li> </ul>	<ul style="list-style-type: none"> <li>• Legal preparation for moving organizational home to OSC</li> </ul>
<b>Partnerships</b>	<ul style="list-style-type: none"> <li>• Ensuring full stakeholder participation</li> </ul>	<ul style="list-style-type: none"> <li>• Assistance or referrals for grant proposals</li> </ul>

# Community Services

Area:	Purpose:	Services offered:
<b>Advising &amp; Mentorship</b>	<ul style="list-style-type: none"> <li>• Mentorship programs preparation</li> <li>• Metrics and evaluation</li> </ul>	<ul style="list-style-type: none"> <li>• No ongoing costs to participate in programs (subject to capacity)</li> <li>• Preparation (assessment, documentation, 1-on-1 advisory, and, follow-up)</li> <li>• Enhanced Planning: evaluation, write-up of metrics plan, setup of dashboards, training (20 hours)</li> </ul>
<b>Direct Assistance &amp; Professional Services</b>	<ul style="list-style-type: none"> <li>• Community strategy assistance for a) contributor onboarding practices and b) engagement and retention of contributor community</li> </ul>	<ul style="list-style-type: none"> <li>• Current state evaluation/ interviews, research, documentation/ recommendations, presentation/ Q&amp;A (20 hours)</li> <li>• Adds policy deployment, limited initial support/training of key process people (40 hours)</li> </ul>

	<ul style="list-style-type: none"> <li>Recommendations: for best tools and platform etiquette for community management</li> </ul>	<ul style="list-style-type: none"> <li>Adds deployment &amp; configuration, limited initial support (40 hours)</li> </ul>
<b>Tactical Grantmaking</b>	<ul style="list-style-type: none"> <li>Assistance with preparation of reports to stakeholders &amp; funders regarding project activities</li> </ul>	<ul style="list-style-type: none"> <li>Current state evaluation/ interviews, research, documentation/ recommendations, presentation/ Q&amp;A (10 hours)</li> <li>Adds full development of reports, co-presentation to stakeholders (20 hours)</li> </ul>
<b>Partnerships</b>	<ul style="list-style-type: none"> <li>Strategic partnerships to promote diversity and inclusion in T4D.</li> <li>Recognition programs for outstanding contributors, volunteers, and other community members.</li> </ul>	<ul style="list-style-type: none"> <li>Current state evaluation/ interviews, research, documentation/ recommendations, presentation/ Q&amp;A (10 hours)</li> <li>Adds full development of reports, limited initial support/training of key process people (20 hours)</li> </ul>

## Technical Services

<b>Area:</b>	<b>Purpose:</b>	<b>Services offered:</b>
<b>Advising &amp; Mentorship</b>	<ul style="list-style-type: none"> <li>Best practices, Mentorship program, customized roadmap according to maturity and vision.</li> <li>Health/Structural Assessment</li> <li>Roadmap for projections</li> </ul>	<ul style="list-style-type: none"> <li>Understand project's capacity for customized support</li> </ul>
<b>Direct Assistance &amp; Professional Services</b>	<ul style="list-style-type: none"> <li>Structural Assessment: Positioning and setting for achieving long-term success and scale.</li> <li>Customized approach in building a suitable business model for the project.</li> <li>Direct technical assistance</li> </ul>	<ul style="list-style-type: none"> <li>Documentation systems</li> <li>Interoperability</li> <li>Software development</li> <li>Architecture</li> <li>Systems engineering communication platforms</li> </ul>
<b>Tactical Grantmaking</b>	<ul style="list-style-type: none"> <li>//</li> </ul>	
<b>Partnerships</b>	<ul style="list-style-type: none"> <li>Communication within OSC network</li> </ul>	<ul style="list-style-type: none"> <li>Access to forums</li> </ul>

# Sustainability Services

Area:	Purpose:	Services offered:
<b>Advising &amp; Mentorship</b>	<ul style="list-style-type: none"><li>• Business Model and Organizational Structure</li></ul>	<ul style="list-style-type: none"><li>• Goals and tradeoffs of different business structures</li><li>• Analysis of revenue streams and associated costs</li><li>• Roadmap for projections</li></ul>
<b>Direct Assistance &amp; Professional Services</b>	<ul style="list-style-type: none"><li>• Structural Assessment</li><li>• Building business model</li></ul>	<ul style="list-style-type: none"><li>• Positioning and setting for achieving long-term success and scale</li><li>• Customized approach in building a suitable business model for the project.</li><li>• Financial modeling support</li></ul>
<b>Tactical Grantmaking</b>	<ul style="list-style-type: none"><li>• Small tactical grants</li><li>• Fiscal sponsorships</li></ul>	<ul style="list-style-type: none"><li>• Address neglected bottlenecks affecting project effectiveness and momentum</li></ul>
<b>Partnerships</b>	<ul style="list-style-type: none"><li>• Facilitation of multi-project collaborative opportunities</li></ul>	<ul style="list-style-type: none"><li>• Peer review for proposals</li><li>• Coordination of interoperability within a single ICT4D sector</li></ul>

## About DIAL

The Digital Impact Alliance is an independent global alliance funded by leading development agencies and private foundations. DIAL was established in 2015 and is housed at the UN Foundation.

We are a “think, do, replicate” tank. We combine practical research with evidence-based advocacy to advance digital inclusion to achieve the SDGs. DIAL identifies barriers to the routine use of digital solutions and data by development actors (countries, NGOs, multilateral institutions); tests ways to remove them; and package solutions for these actors to use in service delivery efforts.

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## About OSC

The Open Source Center at DIAL is a service and support unit for open-source global goods working to create social impact under the SDG umbrella. We provide direct support to projects through offering a platform for grants, technical consulting, mentorship programs, and a community of support.

<https://www.osc.dial.community/>