

Name

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Project Title

TPF capability development, working for the Perl community

Synopsis

The Perl community has a wealth of excellent computer scientists and technologists. This is necessary, but not sufficient, to meet the aspirations of the community circa 2009. It has become apparent over time that we lack both volunteer time and talent to collectively perform other functions necessary for success: strategy, organization, planning, communication, public relations, financial development, alliance-making. Also, the traditional techniques used by the Perl community to find and direct resources have not proven effective in these fields.

The Perl Foundation (TPF) has been aware of this at some level for years but has had a shortage of available person-power to invest into projects:

- That improve TPF;
- That benefit the Perl community;
 - As perceived to be a benefit by TPF;
 - As suggested as projects to TPF by members of the Perl community.

Due to a rare confluence of factors:

- TPF has in its possession available funds, through the Ian Hague donation of 2008, already earmarked for exactly this kind of work that it could make available to fund someone to work on projects per the above;
- Richard Dice, the President of TPF, has time available that he can offer to TPF for these purposes.

I propose that TPF provides funding to me in order to secure my time, on a contracting basis, for the purpose of addressing a long list of projects. (See attached Appendix A.)

Benefits to TPF and Perl community

Each project listed in Appendix A has its own resulting benefits. Taken together, TPF will be reshaped into an dynamic, active organization, capable of advancing the Perl programming language (Perl 5 and Perl 6) and supporting the Perl community in its aspirations and goals.

This is especially important given that Perl 6 is rapidly approaching its release. TPF can help advance the release schedule for Perl 6 and also help prepare the larger world for its release (e.g. PR engagement with the IT press, prepare information packages for business consumers, advise academic institutions on how Perl 6 can be used as a teaching language).

Regarding Perl 5, TPF can work with p5p to develop a more sustainable development and maintenance model, and also foster better vendor/distributor relationships for more effective mutual communication and feedback between these groups and p5p.

Scope of Work

See attached Appendix A for a list of projects and initiatives to be addressed. The scope of work of this proposal is to address the items in this list in order of priority and feasibility, either directly with my own work or in combination with volunteer efforts from the community. In addition to the listed items in Appendix A, this work arrangement will include and enable the various ad-hoc work items of the TPF President: responding to inquiries from Perl community members or people/organizations from outside the Perl community, participation in and support for internal TPF projects and working groups, sponsorship and donations-related work, etc.

Note that it is not expected that all items can be completed in the scheduled duration of this proposal (see next item, below), and that some items might be addressed but with room for extended work on them in the future.

Proposal Schedule

6 months, renewable for another 6 months upon mutual agreement. At the end of the first month of the work term the TPF Directors, given the recommendation of its overseer (see below), will judge the success of the project work to date. If it is acceptable then the contract will continue for the remaining 5 months of the work term. (See Appendix A for details on proposed work to take place within which parts of the work term.)

Schedule to commence tentatively on May 1, 2009. To be determined.

Report Schedule

Brief weekly summary reports, longer monthly write-ups, to be posted internally to the TPF Steering Committee wiki and to the news.perlfoundation.org blog.

Bio

I am the current President of TPF, past Steering Committee chair, organizer of numerous Perl events in Toronto between 2001 – 2008, Perl monger since 1999, professional Perl programmer and/or manager of Perl programmers since 1995. I have written several books and magazine articles regarding Perl or related topics using Perl as a demonstration language, I have spoken at many conferences, and I have trained Perl professionally. Both personally and through my work with TPF I have visibility and a profile within the Perl community, and in other Open Source communities.

During my involvement with TPF I have completed a number of important projects, which should give TPF confidence in the prospects for this work proposal; here is a list of the major items:

- Chairman of the successful YAPC::NA 2005 conference (2004-5);
- Forrester Dynamic Language Survey participation co-ordination and original work (summer 2007);
- LSB 3.2 spec acceptance of Perl 5.8.8 (2007 – early 2008);
- Research into Perl as a part of the larger IT ecosystem, including public presentations of results at various conferences (2007);
- Acquired and arranged the Mozilla Foundation / TPF grant for Patrick Michaud's work on Perl 6 “Rakudo” (late 2007 – early 2008);
- Acquired and developed the Ian Hague Perl 6 development donation & subsequent grants (2008);
- Acted as TPF representation at non-Perl conferences (Money:Tech, EclipseCon) (2008)
- Wrote TPF response to Government of Canada RFI regarding Open Source software (early 2009).

Country of Residence and Citizenship

Canada

Amount Requested

\$5,000 USD per month * 6 months = \$30,000 USD

For comparison, this is the same nominal monthly budget amount as is being provided to the Ian Hague Perl 6 Development grant recipients. This figure is based on the currently-constrained finances of TPF and is not representative of what a more financially mature organization, either private-sector or in the Open Source community organization space (e.g. Mozilla Foundation, Eclipse Foundation, Linux Foundation), would or should compensate for comparable work and/or for a person with comparable skills and background. As is the case with all Hague grant recipients, the candidate is permitted to supplement this income with minimal outside consulting opportunities, so long as they do not compromised the integrity of the project proposal work.

Expenses Budget:

1. \$350 CAD (plus incidentals) per month for co-working office space;
2. Travel costs for meetings and conferences, conference fees where applicable;
3. Miscellaneous expenses as needed.

As the funds for this work proposal are already secured and available for allocation to this (or similar) proposal(s), acquisition of further funding will not be a success metric for the proposal. However, part of this proposal is to identify further projects that TPF should participate in, and to the extent that these projects themselves require financial resources for their success then identifying, pursuing and acquiring funds for those projects is within the scope for this proposal.

Okay to publish proposal this proposal?

Yes, on <http://news.perlfoundation.org/>

Suggestions for Proposal Oversight/Overseer

As decided by the TPF Board of Directors. An overseer could be a member of the Board or not. Reporting will be made common to the overseer as well as TPF and the Perl community at large simultaneously. Alberto Simões, the Grants Committee chair, is respected, trusted, organized and conscientious, and has the ability to contextualize projects within the bigger picture of organizational goals. He could be a good choice.

Appendix A: Project List and Work Items for TPF Development and Perl community service

The work items below are labelled according to the following scheme for prioritization:

- (a) Initial 1-month period
- (b) Balance of 6-month engagement
- (c) Likely work for future engagements/renewals

Some of these points are likely to be on-going, or can be done in stages, and this is donated with multiple labelling (e.g. rough work is done in (a), continued work in (b), on-going work in (c)). Time estimates are also attached to labelling. These are designed to give guidance regarding the potential size of work, as well as their likely relative sizes. A number of these items are able to be re-sized to the fit the actual amount of time available (e.g. business development work, research, policy creation).

TPF Internal work

- Budgeting – (a) (3 weeks)
 - Create a formal budget procedure
 - Analysis of past expenses, revenues, plotting into the future, creating budget categories
- Treasurer procedures - (a) (2 days)
 - President or SC chair approval “purchases orders” that the Treasurer can review before making payments
- Donor relations - (a) (1 week)
 - Create and snail-mail any outstanding thank-you and receipt donations
 - Web site rewrite of donor material, inclusion of expanded donor recognition materials
- Strategy - (b) (5 weeks)
 - Marketing plan for TPF & Perl
 - Strategy plan for TPF & Perl
 - Research other free foundations for ideas, points of comparison
 - Mission & goals (short, mid, long term) (also a "TPF External" item, vis-a-vis community engagement)
 - Arrange a summit discussion with TPF & Perl community members to discuss
- Steering Committee (working with SC Chair) - (b) (2 weeks)
 - Disentangle concepts of TPF staff roles vs. "United Nations of Perl" representatives
 - Set up mechanism for the “Perl UN” roles to reflect changes in Perl community over time
- Conferences Committee procedure development (with CC Chair) - (b) (2 weeks)
 - YAPC::NA timeline, checklist, etc. creation
 - Hackathon support materials, networking to encourage Hackathons, etc.
- Grants Committee procedure development (with GC Chair) - (a) (2 days)
 - Getting standard application forms
 - Standard "social contract" with grantees
 - Standard progress report with grant managers
 - Processing GC Rules of order (per internal TPF email discussion in early 2008)
 - Providing the GC with a standard budgeting procedure and funding stability
- Community Relations - (b) (2 weeks)
 - Better definition of mechanics of relationship between community and TPF
 - Creation of PM group starter, sustaining kits, “best practices” compilation and distribution

Appendix A (cont.)

TPF External work - Outreach & Presentation (of TPF and Perl)

- Publicity - *(b) (1.5 weeks)*
 - Creation of PR list (journalists, etc.)
 - For Perl in general
 - For p5 / p6 / TPF
 - Offers to the community to use the PR list for Perl projects
 - Translations to multiple languages / media in various languages & countries, create community team to do this
- TPF Onion logo plans - *(b) (1 week)*
 - Logo modification & use procedure
- Reorganization of pages on www.perlfoundation.org, expansion of material covered - *(b) (2 weeks)*
- Work with tchrist, O'Reilly and larger Perl community to revitalize www.perl.com - *(b) (2 weeks)*
- Policies / procedures for interacting with perlfoundation.org - *(b)*
- Preparation of talks based on research and/or TPF position statements and/or work being done within TPF - *(b) (4 weeks)*
 - For in-person delivery at conferences or other events
 - Available online
- Attending conferences and/or business meetings (approximately 1 week per month) - *(a, b, c)*

Partnerships

- Businesses – *(b, c) (4 weeks)*
 - Funding
 - Publicity (i.e. info re: local mongers to companies, YAPC, other perl events)
 - Case studies
- OS Vendors (e.g. Fedora, Red Hat, Apple, IBM, etc.) - *(b,c) (2 weeks)*
 - Packaging, patches, test systems
- Academics - *(b, c)(4 weeks)*
 - Gathering info on Perl from their point of view
 - Providing PR, information to academic institutions
 - p6 especially
 - Create communication channels to academic institutions

Appendix A (cont.)

Fund-raising / Business Model creation - (b, c) (10 weeks)

- Community
- Businesses
 - Small donations
- Strategic
 - Large businesses
 - Other OS organizations (e.g. Mozilla)
- Philanthropic (e.g. Hague donation)
- Affinity credit card program w/LinuxFund possibility

Research - (b, c) (8 weeks)

- Create profiles of Perl-using companies, their value drivers, their decision process, etc. (also: Outreach & Presentation)
 - Good opportunity to liaise with companies to ask for donations too
- Perl's use in larger IT landscape, comparison to other languages in class (e.g. Ruby, Python, PHP)

Perl 5 Support - (b) (2 weeks)

- p5p
 - This group is experiencing stress
 - Offer to help with process, staffing, other
- Establish OS, distribution and hardware vendor/distributor relations
 - E.g. EBCDIC patch issues and co-ordination with IBM, OS/390 testbed acquisition

Perl 6 Support - (b, c) (8 weeks)

- Provide support to p6 definition and implementation projects
- Prepare the world for the coming of Perl 6