

Out In The Open

With software needs overwhelming institutions, open source allows universities to work together for the common economic good.

In the past, many colleges would handle their software needs, be it financial programs on down, through commercial entities. It would work fairly well, at least when the vendor wasn't discontinuing its service with little notice, forcing colleges to scramble to figure out how to reconcile programming issues, sometimes to the point where they couldn't. Finally, schools such as University of Indiana and University of Hawaii had enough. Deciding to go off on their own, they quickly realized it was preferable to be in control of their own destiny—except they might have even better results if they joined forces with other schools, combining resources and diminishing headaches. By leaving software creation open and out of a commercial patent situation, these schools were embracing what's known as the open source movement. Up ahead, we talk with the CIO leaders of the aforementioned schools to find out how it's changed their programs and might even change yours.

Building Together

Though it's been called everything from essential to even evil, Brad Wheeler, CIO of Indiana University, wants you to know that open source is simply a tool, not a solution onto itself. "It's a way to build together and have shared economics in the results," he says, "We walk away with the code to these projects, all of us." In fact, he's chairman of the Kualu project, a non-profit organization of several colleges, including University of Hawaii, University of Arizona and Cornell University, with the mindset of comparing software goals and utilizing all of their resources for the best open source outcomes possible. "With an Andrew Mellon foundation grant of \$2.5 million and \$5 million of our own, we've been able to make sweeping changes," Wheeler says. "We released our first Kualu program in October and we'll be releasing two more for payables in July. The driven cadence we use forces group decisions to keep things moving along and allows us to get work done in open source tradition—we want to release early and often and keep improving." The Kualu Web site described the October-released program as a financial system devoted to "accurate accountability, timely reporting, efficient processing, and strengthened internal controls through computerized business rules."

Still, for David Lassner, CIO of the University of Hawaii, Kualu has been far more than just a better way to keep the books. "We are all learning from each other with Kualu and, to be honest, it's not always easy to work collaboratively through so many institutions," he says. "But collaboration is the mode of how we serve our communities, becoming more cooperative, whether it's about large research projects together in science or it could be education with new agreements for students to transfer easily. It could even be teaching courses with other universities to develop new courses. What's interesting is in many ways software is lagging compared to other parts of the college system—we want that change."

Wheeler says his school has also seen many secondary benefits through Kuali and open source. “It can improve staff development and leverage support and the knowledge sharing aspect comes into play. Best practices can’t help but improve through having an open dialogue with other schools.” But most important for Wheeler is the freedom open source programs like this allow his school. “I know of a major university which was told by a vendor that they’re dropping their student system 6 years into the contract. Or there was a message going around about Oracle dropping their calendar system. That meant people had to go with Oracle’s need software. Not the best way to go to accomplish the value of a full life cycle.”

Blackboard Blues

The software application company Blackboard came on the scene as a way for colleges to do everything from post grades online to even transactions, but to Wheeler and many other college CIOs it’s seen as a potential monopoly which leaves colleges with few options. “You fundamentally have a clash of values between higher education and Blackboard because they’re about suiting their shareholders and they believe one of the ways to do it is to try to create monopoly franchises on certain ideas. Essentially the first patent they received is about differentiating roles in courses. For example, I may be a student in a course, but if I’m also a graduate assistant in course B I have rights as an instructor. Blackboard asserts that they invented this idea that there are different roles for different types of courses. They say it’s not their intent to harm the open source community but one must judge for themselves.” The company has gone as far as to put a patent pledge on their Web site which states: “Blackboard hereby commits not to assert any of the U.S. patents listed below, as well as all counterparts of these patents issued in other countries, against the development, use or distribution of Open Source Software or Home-Grown Systems to the extent that such Open Source Software and Home-Grown Systems are not Bundled with proprietary software.” It goes on to list its one issued patent and seven pending patent applications which include Internet-based education support systems and a system for conducting online transactions. *Academic Commons* (www.academiccommons.org) stated that the patent could also be a threat to wikis and blogs for higher learning. “The problem is we just don’t know what rights Blackboard will be given next,” Wheeler says. “It’s frustrating when you’re trying to create a community that shares ideas.”

Despite the uphill battles with Blackboard and even within trying to balance several university philosophies, Wheeler is optimistic about the future of colleges and open source. Still, he feels colleges should limit the amount of communities like Kuali for best results. “What we don’t need in higher education is lots of little communities who are all trying to invent the wheel,” he says. “When you create a community you need email listservs, licensing and more. You have to make sure you have enough commitment to follow through.”

Sidebar

Open Problems

Although open source allow for an amalgam of freedom, it's not right for every situation. Here are the pitfalls to look out for:

- 1) **Reliance**—because you're in it with other universities, to some extent you rise and fall with them. Would you rather put your future in other schools which devote some of their time to this software or to a company which devotes a great deal more?
- 2) **Expense**—while open source can have cost benefits, it's not free. Considering the amount of time you may have to spend educating yourself on it, it may end up costing some campuses more than commercial alternatives.
- 3) **Forfeiture**—despite BlackBoard's vow to stay away from open source, we all know companies can change their minds or find loopholes in their own promises. Would you like to invest in something for years, only to see it be rendered as unusable due to patent violations?