

# Co-operative Assistance Network Limited (CAN)

## Open Source Policy

### **Definition**

The term "open source" refers to something that can be modified because its design is publicly accessible. Whilst it originated in the context of computer software development, today the term "open source" designates a set of values, including:

- Free exchange of ideas
- Collaborative participation
- Transparency
- Creation by communities of shared interest
- Rapid prototyping, to find solutions faster by experimentation
- Meritocracy of ideas, in which the best ideas win.

Open source projects, products, or initiatives are those that embrace these values.

### **Context**

CAN strives to comply with open source principles. That is to say:

- CAN stands against the capitalisation of protected intellectual property rights for the generation of profit
- CAN stands for the collaborative development of software and other products for mutual benefit and the common good.

Application of this policy:

- Places CAN amongst various communities that are:
  - Collaboratively developing the software that we use and the products that we create and distribute
  - Committed to playing an active role in improving the world
- Obliges CAN to:
  - Be a responsible member of those communities
  - Participate in the development of those communities.

The rationale of this policy is that open source working is fully compatible with co-operative development – our core business – and with Co-operative Principle 6: co-operation between co-operatives.

This policy helps to further CAN's strategy of helping co-operative enterprises to develop together as a movement, on the commercial basis that a well-developed co-operative is a more competent customer than an underdeveloped one.

Application of this policy impacts CAN in 3 ways:

1. The way our workers collaborate, including the accessibility of the data held on our server
2. The choice of software that we use
3. The licensing of products that we create and distribute.

## **1. The way we work**

“Open source” is an attitude that permeates all aspects of the way CAN works. For example:

- All CAN Members have access to all the “source code”: the Rules, policies, minutes, knowledge base and resources
- Procedures exist to enable CAN Members to modify the Rules, policies, procedures and the tools and systems that we use
- Rights of access to data on our server (permissions) err on the side of openness and transparency
- No CAN Member is disallowed from contributing to any project
- All CAN workers are encouraged and facilitated to participate and collaborate within the bounds of practicality.

Product development in particular is a collaborative activity, overseen by Product Development Team Leader. Prototypes are developed quickly to facilitate further progress. Competing contributions are assessed on their merits and not by their source.

## **2. Use of software**

When selecting software to use, CAN will always prefer open source to proprietary software. CAN will only use proprietary software if there is no open source product available that has the required functionality. This means that whenever possible CAN will:

- Not pay software licence fees
- Prefer software with open source licences
- Migrate from proprietary to open source software
- Prefer software providers:
  - To which bug reports and development suggestions can be submitted and acted upon
  - That comply with open source principles
  - With whom we can collaborate and freely exchange ideas
- Promote the use of open source software

CAN's ICT Team Leader is appointed to:

- Provide guidance to CAN workers on open source matters relating to the software we use
- Arbitrate on disputes and conflicts arising from the impact of this policy relating to the software we use

## **3. CAN products**

In this context, CAN products are all products that are authored or originated by

CAN and placed in the public domain, i.e. made available to customers, clients or the general public. This includes but is not limited to:

- IAG sheets
- Handouts for trainees
- Exercises
- Presentations
- Publications
- Templates
- Interactive toolkits
- Free downloads
- Website content.

This excludes anything that is delivered to a customer or client under a confidentiality or non-disclosure agreement.

By default, CAN products will comply with open source principles. That is to say CAN will:

- Not assert ownership of the intellectual property rights of the product (but may assert authorship)
- Allow, encourage and facilitate consumers to suggest improvements to the product and to report bugs and errors. CAN will consider all such suggestions and reports when designing subsequent versions of the product
- Allow the free distribution of the product (sometimes on the condition that CAN is attributed as the author).

These terms and conditions must be included as part of the product or as part of the package in which the product is delivered. They can be in the form of a copyright notice, an appropriate Creative Commons licence, a terms and conditions statement or any other appropriate form.

The terms and conditions of some products may require CAN to maintain a register of users. This register is managed by Product Development Team Leader (on the basis that PDTL is responsible for version control, publication and distribution of products with open source licences).

It is recognised that there may have to be exceptions to this rule for some specific products. These exceptions must be approved by PDTL (see below).

CAN's Product Development Team Leader is appointed to:

- Provide guidance to CAN workers on open source matters relating to our open source products
- Maintain a register of users of those CAN open source products that require users to register
- Arbitrate on disputes and conflicts arising from the impact of this policy relating to our open source products
- Evaluate requests to release products that do not comply with open source principles and either approve or reject them

- Develop training resources about open source working for internal and external use
- Work with Marketing Team Leader to promote open source working.

### **Strategic development**

CAN's ICT Team Leader is appointed to:

- Hold a strategic view of CAN's development as an open source organisation
- Monitor and review this policy and its application
- Monitor and report on CAN's performance as an open source organisation (which may be subject to audit by CAN's Internal Audit department).

CAN's Product Development Team Leader is appointed to:

- Assist CAN's ICT Team Leader with the above tasks.

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Responsible Department: ICT

Implementation Date: 17 December 2015

Review period: 5 years

Next review due: 31 March 2022

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Agreed at Directors Meeting of 31 July 2015

Passed at Members Meeting of 17 December 2015