dial Digital Impact Alliance

# How to Make your Open-Source Projects Sustainable

## A Workbook & Toolkit

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## 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.

https://digitalimpactalliance.org/ | info@digitalimpactalliance.org

## 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/

## Acknowledgements

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- Mifos (https://mifos.org)
- Primero (https://www.primero.org)
- TransIT (https://www.chemonics.com/impact-story/in-transit-enhancing-visibility-across-in-country-supply-chains)
- Reveal (https://revealprecision.com)
- Flint (https://moja.global)

This workbook was developed to allow open source digital development projects to plan for their long term sustainability. We thank the Principles for Digital Development community (https://digitalprinciples.org) for their support in advising and reviewing as this content was developed.

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# Part 1
# Introduction & Background

## Users of this Sustainability Workbook

**This workbook is for you, if your open-source project:**

- Has financial, material, and/or technical support of a funding partner or donor agency to fill a humanitarian/development need or demand,
- Has been developed by an international or humanitarian organization and is housed within that organization,
- Has been developed by an academic institution, or
- Is currently being developed or used by governments
- Is in any of the multiple sectors that can benefit from sustainability planning, such as health, finance, education, agriculture, supply-chain management, case management, etc.

**This Sustainability Workbook is intended for:**

- Organizational leadership interested in making strategic decisions
- Advisors and consultants assessing, designing, and implementing projects
- Professional development and training practitioners, and
- Other relevant stakeholders

## Use of Sustainability Workbook

This workbook is intended to be a practical, evolving output for practitioners who want to create sustainable open-source tools for community change. It is a series of exercises designed to gather critical information in planning for sustainability. This workbook does not make recommendations but rather allows a project to think through various topics related to sustainability and is used in conjunction with the consulting services that the OSC provides for a guided process to navigate sustainability issues. It is being regularly updated and user-tested to ensure it is as up-to-date and useful as possible. While this workbook can be used by teams to plan for their long-term sustainability, it is primarily an information gathering tool designed to provide a baseline for planning. Please check the conclusion for forthcoming sections, and here for the most recently updated version.

## Open-source software is a key to social change

Technology is one of the critical pathways to accelerate achievement of the Sustainable Development Goals (SDGs)[1], and open-source software is one of the most promising and exciting ways to harness its power. In recent years, the international donor community has begun to recognize the potential of open source for positive social change across sectors and communities around the world.

Open-source global goods are freely available digital tools that are adaptable to different countries and contexts. The development of global goods is often initiated when an organization needs a digital tool to help meet a social impact outcome but cannot find exactly what they need. When no existing tool meets the exact specifications and requirements, building a custom solution and sharing it as free and open-source software becomes a favored option.

Open-source tools have many uses: they are commonly used in small business loans and financial management, for charities connecting with beneficiaries, and for managing patient records in hospitals and clinics. In the mix of software that is deployed in international development and humanitarian projects, open source is widely embraced as a promising option to facilitate widespread adoption, avoid costly vendor lock-in, and give broad freedom to the users of the tool.

For projects or organizations that address acute community needs –stemming from conflict, natural disasters, and endemic or pandemic crises – open-source software plays a critical role in providing economic, environmental, and social support. Being iterative and flexible by their nature, open-source tools can help groups achieve greater outreach, conduct their work in diverse and challenging environments, and improve the lives for the world's most vulnerable and marginalized communities.

## Opportunities for sustainability of open-source global goods

To succeed in the long-term, open-source projects must be sustainable. Although the word "sustainability" can mean different things depending on a project's context, size, and sector, a sustainable tool is one that is resilient to fragmentation, abandonment, and duplication. Building sustainability enables projects to achieve long-term success, by ensuring those projects have support at all stages of their development. This purposeful support can help deter common pitfalls that lead projects to fail after they launch, before they gain momentum, or before they achieve scale and maturity.

**What makes an open-source project sustainable? The OSC identifies five key foundations for sustainability of digital public goods:**

1. A **legal entity** to hold intellectual property and facilitate funding,
2. A **primary maintainer** that serves the role of leading strategy, governance, community management and product roadmap,
3. Access to dedicated **skilled human resources** to build and maintain the core software and implementations,
4. **Financial resources** to support core product development, and
5. A robust, diverse, collaborative, and engaged **community of practice**.

So when is the right time to start thinking about the sustainability of your open-source project? The OSC suggests that sustainability should be considered from the beginning, but that does not always happen. Many open-source projects begin as a response to a specific need and secure initial funding from a donor that recognizes merit in the proposed solution – but don't necessarily build in a sustainability plan during the ideation stage. In fact, many teams don't start thinking about sustainability until their initial funding is reaching the end of its term – which may be too late.

[1] https://sdgacademy.org/jeffrey-d-sachs-et-al-six-transformations-to-achieve-the-sustainable-development-goals/

## Challenges faced by open-source global goods

While building sustainability may be the best way to safeguard your project against future threats, it is not always easy. Open-source works best when users of the software contribute their changes to the source code back to the community. Without a robust mechanism in place that ensures the balance of the relationship, the consumers of the software often extract more benefit from the community than what they contribute back, resulting in many projects struggling with a tragedy of the commons. This can happen for several reasons: either due to a) community governance issues, where the user community does not fully understand how to choose, develop, and/or understand the complexity of the tool, b) the tool outgrowing its current business model under its primary maintainer (usually an academic institution or NGO), or c) the donor or primary maintainer becoming disinterested in sustaining the tool long-term.

Figure 1 illustrates the lifecycle of an open source global good. Many projects are unable to grow, scale, or mature for widespread adoption due to common challenges stemming from "changes in a project's resources, community, and environment." In many cases, there is a disparity between how fast the project is able to respond to changes and traditional access to resources for NGOs, which are primarily dependent on the funding requirements of donors.

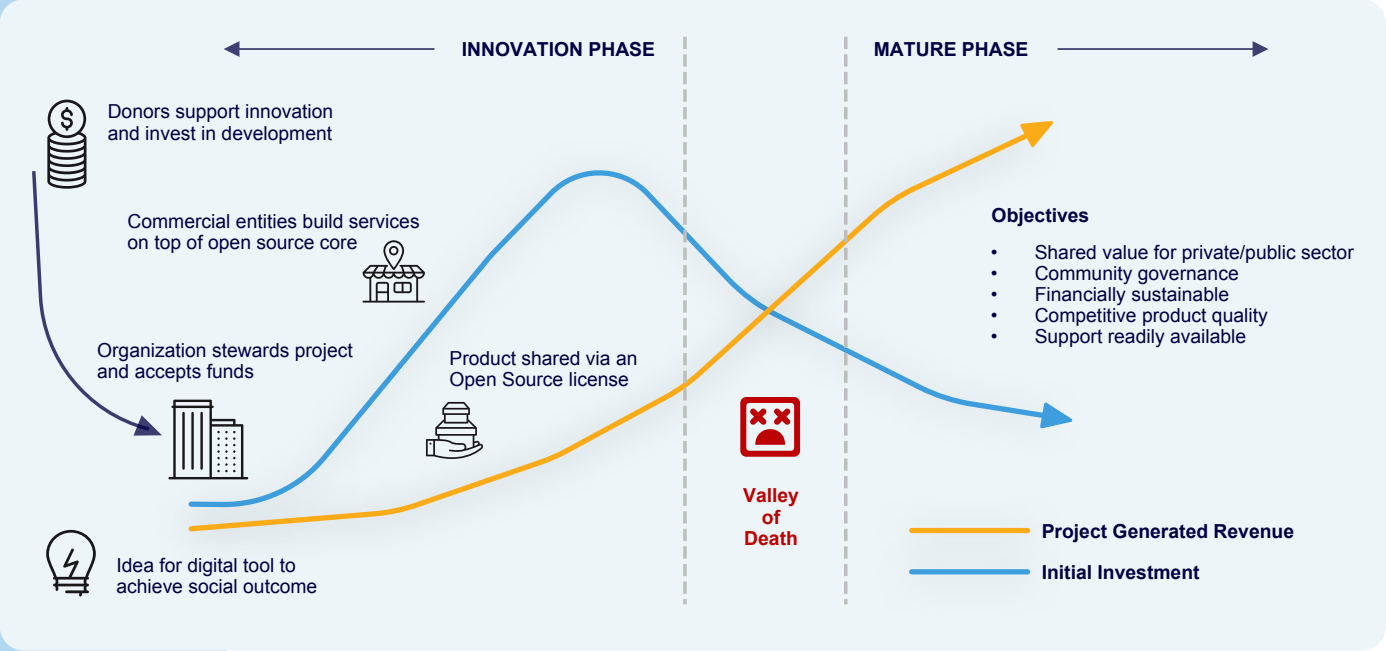



*Figure 1: Jouney of an Open Source Global Good. Developed by OSC, DIAL*

Transitioning between the innovation phase to the mature phase holds many potential pitfalls. Like proprietary systems, digital public goods face the "valley of death" as they outgrow the model that supported them in the innovation phase. The initial catalyzing enthusiasm and investment must gradually be replaced by sustainable business models. Unfortunately, many public goods come to their end during this phase.

Once the software product begins to enter maturity, in terms of adoption and scale, the initial innovation funding that got the project off the ground is often reallocated to other projects. This means that internally generated revenue and community contributions may have to meet the project's resource needs. Ironically, sustainability challenges often come to the fore just as the project begins to scale and programs become reliant on it. Solving the challenge of sustainability is essential for the tool to continue to address the social challenge it was created to solve.

To complicate matters, budgetary limitations that often occur for providing extension hooks and using standards can increase the tendency towards extensive customization and forking. In turn, customization decreases opportunity for collaboration. In the end, many projects find themselves without community governance systems to support users of the software. Since technical service-provider ecosystems have not yet matured, organizations and governments face increased maintenance costs, which can exceed costs of proprietary commercial systems. When this happens, the opportunity for creating global shared value is lost.

For the open-source community, then, a critical challenge is to support global goods as they scale up and mature. An early focus on sustainability can help projects survive through the "valley of death" and thrive into the "mature phase."

## Objectives of the Sustainability Workbook

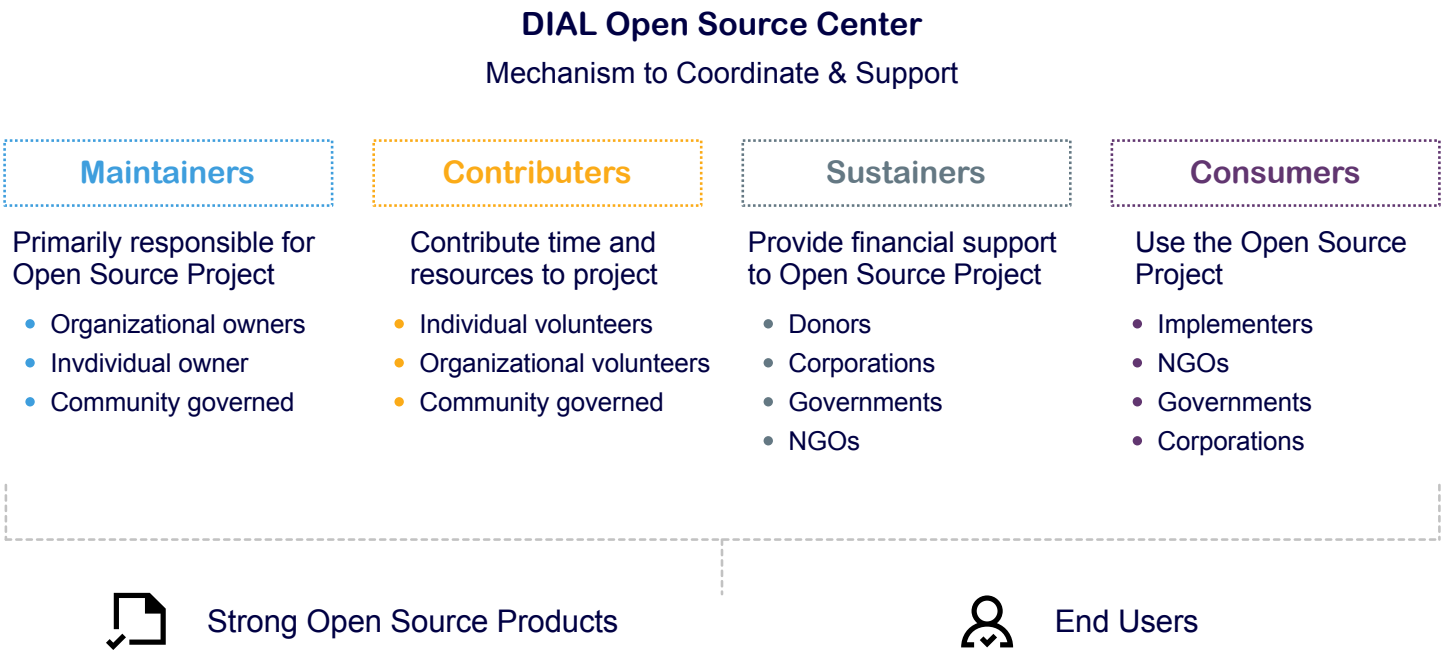
The Open Source Center was created to provide support and guidance to open-source global goods on community development, technical architecture, governance, sustainability, mentorship programs, and small-grant needs. This Sustainability Workbook is an outcome of OSC's requests from projects for a "how-to guide" to strategically approach sustainability issues as their project approaches maturity. Building for sustainability can help attract and achieve buy-in from different stakeholders involved, increase usage as ongoing support is assured, improve brand image and competitive advantage, reduce interruptions, ensure financial continuity, and maximize long-term impact.

One of the challenges to sustaining open source global goods is that critical stakeholders are decentralized by design. Successful stewardship of these tools requires a foundation of strong community governance to define the roles and responsibilities of these diverse ecosystem players.

This workbook explores strategic considerations in two ways: planning and implementation to strengthen the areas most critical to meeting your project goals. The parts that follow include checklists worksheets that help you consider the foundations of sustainability. Finally, the worksheets are designed to be flexible and can be completed from start-to-finish or on an as-needed basis. They can be completed in a few weeks or over a longer period, depending on the context and goals of your individual projects.

**The categories of open-source stakeholders include:**

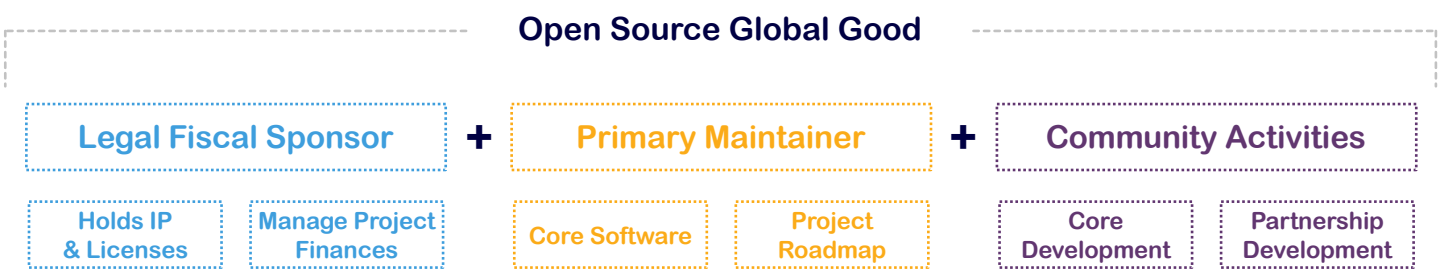
1. **Maintainers**: Individuals or organizations that take the primary responsibility for the open-source project
2. **Contributors**: Those who contribute time or resources, usually in the form of code, to the project
3. **Sustainers**: Source for financial support to support the open source project
4. **Consumers**: Organizations that use the project, either for their own use or as consultants




**Structural Considerations:**

Open-source software is software with a license that governs use. However, for the project to be successful, there must also be clear governance to allow for stewardship and sustainability of the project. Therefore, it is important to identify roles and responsibilities within the community governance. There are various governance models that open-source global goods can consider, and the exercises in this workbook will help you determine which structure makes the most sense for your project.

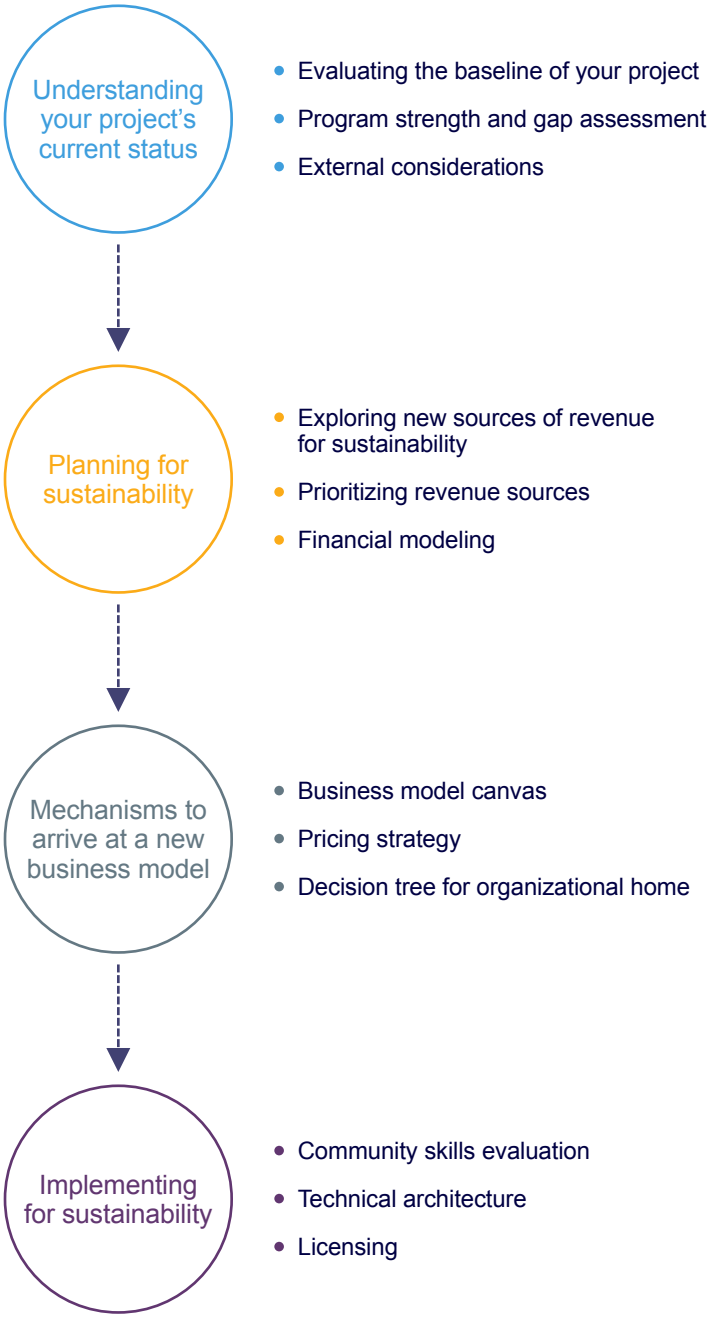
No matter which structure you choose, it is important to define a legal entity to take on fiscal responsibility and identify the organization or individual who will play the primary role in maintaining the project. While operational activities can be accomplished by a single organization, it is sometimes beneficial to separate them.



# Part 2

# Planning for Sustainability

RELATIONAL FLOW OF THE WORKBOOK



## Exercise 1: Evaluating the baseline of your project

In this exercise, it is important to bring together key members of your project team to review the current organizational arrangement and whether it is meeting the evolving needs of the software. Consider the key drivers and primary motivation behind thinking about project sustainability. Team members that have different perspectives and interactions on the project can enhance the responses by bringing their expertise and experience to the table.

# Motivation

*Think about your motivations. Are they related to the foundational, strategic, and organizational needs? Or are they related to implementation and operations of your project?*

**Which are the primary motivations for your project in planning for sustainability at this time?**

Project Impact and Usage

Community structure, communication, and interaction

Consensus building and governance

Software quality

Project independence

Licenses and copyright

Management of organizational activities

Software release regularity and transparency

Business model sustainability

Funding

Human capacity development

Other:

# Intended Impact

*Recalling, revising, and revisiting the project's mission and mandate can help anchor your motivations for seeking sustainability.*

| What is the social challenge your project was created to solve? |
| --- |
| |
| **Which SDGs is it aligned with?** |
| |

# Competitive Advantage

*Determine why your project is better at solving a problem than other projects attempting to address similar problems. Creating a competition landscape of direct and indirect competition can help visualize your project's unique value proposition.*

| What is the unique value proposition of your project? |
| --- |
| |
| What is the differentiating feature of your product? |
| |
| Why should consumers have confidence in your product over others? |
| |
| Who are some of your direct and indirect competitors? |
| |

# Long Term Vision

*Are there any fears or frustrations with achieving the vision? Can they be addressed?*

| Revisit the long-term vision of your project.<br>A good indicator to use would be to make a high-level five-year vision. |
| --- |
| |
| What are the primary challenges to achieving your five-year vision? |
| |

# Funding Needs

*Is the funding contract renewable? Will the project have to seek alternatives?*

| How long can current funding support your project? |
| --- |
| |
| Do you have funding to achieve your five-year vision? |
| |
| Will your funding needs change over time as your project scales? |
| |

# Non-Grant Revenue Generation

*Can these alternatives be non-grant revenue?*

| Does your organization generate non-grant revenue? |
| --- |
| |
| How was this revenue generated? |
| |
| What other possible sources of revenue have you thought about but not implemented? |
| |

## Resource Strength

*How will resource needs change as the project grows? Consider specific roles (such as community manager, engineers, architects) and how many are needed.*

| Can your current team support the core product or does the resource strength and mix need to be changed? |
| --- |
| |

## Key Metrics

*Determine appropriate and measurable success factors.*

| How do you define and measure success? |
| --- |
| |

# Licenses

*Are changes required?*

| What FLOSS License(s) does your project use? |
| --- |
| |
| **Why did your project choose this license?** |
| |
| **Do these licenses meet the needs of you project?** |
| |

# Trademarks, logos and patents

*If your project migrates to another fiscal sponsor, what will you need to consider to retain the project branding?*

| Who currently holds your project's' trademarks, if any? (Consider both registered trademarks and those built through common use.) | Does your project have a logo? If so, who drew it, when did they draw it, where is it displayed, and what is its license? |
|---|---|
| | |
| When was your project's name first used, and who used it? | Are you aware of anyone in your project, individual or company, holding a patent in any jurisdiction that are in any way related to your project? |
| | |

| Has your project ever had legal trouble, been involved in legal proceedings or received a letter accusing your project of patent, copyright, trademark, or other types of infringement? |
|---|
| |

# Accounting

*As your project grows, will the same process of facilitation of funds meet the projects evolving needs?*

| Have you ever had funds held by the project, or by any individual on behalf of the project? |
| --- |
| |
| How and for what did you spend those funds? Are there funds remaining? If so, who is holding them now? |
| |
| Does the process of facilitation of funds meet the need of your project? |
| |

## Fundraising

*Is the funding that is brought in through these mechanisms sufficient for operation and growth of your project?*

| Do you have any ongoing fundraising programs for your project? | Do they operate in a way that is useful for your project? |
|---|---|
| | |

## Expenses

*What are some critical requirements in the near term? Long-term?*

| Going forward, how do you expect to spend funds that you raise? | What will it cost to maintain your product? |
|---|---|
| | |

## Debt

*How will this impact the revenue you generate?*

| Does your project owe funds to anyone? |
|---|
| |

## History

*Are there any forks or other disputes that have occurred in the community?*

| Consider the history of the project, focusing on how the community developed and the general health of the community. |
| --- |
| |

## Governance

*How do you resolve disputes, particularly about non-code issues?*

| How is your project governed? Who makes the decisions in the project? |
| --- |
| |

## Affiliations/Partnerships

*By list them in detail and understanding their nature, you can evaluate what type of a relationship to maintain as your project seeks a sustainable model. Even tangential affiliations and relationships, or potential affiliations that you plan to create, should be considered.*

| Does your project have any existing for-profit or non-profit affiliations, funding relationships, or other agreements between the project and/or key leaders of your project and other organizations? Has the project had such affiliations in the past? |
| --- |
| |

# Trademarks, logos and patents

*Determining the needs of your users can pinpoint where changes are needed.*

| How many users does your project have? | Whose needs are you trying to solve? |
|---|---|
| | |
| **How do you reach your users?** | **What problems do your user have and how are you solving it?** |
| | |
| **Which of your product's features are least useful to the end-user?** | **What additional features or functions are needed to address their needs?** |
| | |

# Contributors

| Who are your key developers and major contributors? |
| --- |
| |

| How many are there? | How active are they? |
| --- | --- |
| | |

## Exercise 2: Program strength and gap assessment

Understanding the strengths and gaps for a project is an important indicator of viability for the project. Using the following checklist, identify which areas of your solution fall under which category.

Insufficient information on which to make a judgment | Program Strength | Neither strength nor weakness | Program weakness

| AREA | ASSESSMENT | NOTES |
|---|---|---|
| Product strategy | | |
| Product vision/roadmap | | |
| Product management/ customer engagement | | |
| Product coordination with T4D community | | |
| Architecture/high-level design | | |
| Agile/process management | | |
| Contributor/backlog management | | |
| Software development | | |
| Mentoring | | |
| Advisory board operation | | |
| Marketing program organization | | |
| Volunteer matchmaking/ management | | |
| Conflict arbitration | | |
| Community outreach | | |
| Community policy consultation | | |
| Incubation process management | | |
| External communications | | |
| Corporate compliance | | |
| Financial services | | |
| Business development | | |
| Fundraising | | |
| Marketing/advertising | | |

## Exercise 3: External considerations

Your project's sustainability choices may be impacted by external factors that can impact internal decision-making. Assessing opportunities for growth and understanding the risks and threats they carry will be important for the long-term health of your project. The following checklist will help you identify some of these factors.

Insufficient information on which to make a judgment | Program Strength | Neither strength nor weakness | Program weakness

| AREA | ASSESSMENT | NOTES |
|---|---|---|
| Regulatory environment for individual implementations (particularly when considering implementations in different countries) | | |
| Regional and sub-regional political restrictions | | |
| Funding and/or grant requirements from donors | | |
| Evolving copyright/labor laws | | |
| Economic conditions | | |
| Industrial trends | | |
| Humanitarian challenges, such as conflict, pandemics/ epidemics, or natural disasters | | |
| Regional and sub-regional labor and talent availability | | |
| Existing competition from proprietary or other open-source software, especially "big" market players | | |
| Attitudes toward open-source technology and the idea of global goods | | |
| Technology infrastructure and access to technology | | |
| Environmental considerations, as a market driver | | |
| International requirements around intellectual property, copyrights, and licensing | | |

## Exercise 4: Exploring revenue streams, cost offsets, and other tactics

The purpose of this exercise is to help you evaluate possible revenue streams that can support your digital project's long-term resilience and sustainability. This list is meant to be as comprehensive as possible and will contain revenue considerations that may not be appropriate for all projects. Their inclusion in this worksheet does not denote an endorsement by DIAL's Open Source Center. Each revenue stream should be evaluated within the context of the specific project.

| TRUE REVENUE STREAMS | | WE DO THIS | THIS WON'T WORK | WOULD LIKE TO EXPLORE | NOTES |
|---|---|---|---|---|---|
| **Fundraising** | The process of soliciting financial support for the project | | | | |
| **Grants** | Non-repayable funds disbursed or given by one party (often a government department, corporation, foundation or trust) to a recipient, often (but not always) a nonprofit entity | | | | |
| **Events** | Gatherings of individuals or members to discuss a matter of common interest or a theme. Revenue can be generated on a ticketing basis or sponsorship | | | | |
| **Training fee** | Organized paid activity aimed to help consumers of open source attain proficiency with the maintainer's software | | | | |
| **Certification fee** | Formal paid procedure by which the maintainer can assess, verify, and provide certification that consumers or partners of the project qualify in accordance with established requirements or standards set by the maintainer | | | | |
| **Control brand use or code** | The brand name is intellectual property and having controls for use amongst community members can be utilized as a lever to ensure participation in the community which may have membership participation fees or consulting revenue | | | | |

| TRUE REVENUE STREAMS | | WE DO THIS | THIS WON'T WORK | WOULD LIKE TO EXPLORE | NOTES |
|---|---|---|---|---|---|
| **Software as a Service (SaaS) version** | A software distribution model in which the maintainer hosts applications and makes them available to customers over the Internet through a pay-as-you-go method that allows a customer to use software on an as-needed basis, without needing to install it or purchase a license. SaaS applications can be accessed securely by multiple customers, each of whom typically pays a monthly usage fee | | | | |
| **Support of "on-premise" deployments** | Project provides support services for an installation of the software which has been procured and deployed on their own or through third-party servers | | | | |
| **Data monetization** | The act of turning data into currency. The currency can be in the form of actual dollars, but it also refers to data used as a bartering device or a product or service enhancement. [Not generally recommended by OSC] | | | | |
| **Freemium** | A business model whereby a project provides simple and basic services for free for the user but also offers more advanced services or additional features at a premium | | | | |
| **Advertising** | A digital project attracts an audience by creating content or generating interaction and engagement, and then sells access to advertisers | | | | |
| **Partner membership fee** | Regular fees or charges are paid to an organization at regular intervals by a partner | | | | |
| **Professional services** | Paid consulting services provided on a contract basis with consumers of the product | | | | |
| **Implementa-tion revenue** | Project-based consulting to implement a new instance of the software | | | | |
| **Support retainer** | Amount of money paid in advance by a client to assure the maintainer's services will be available to them for a period of time | | | | |

| TRUE REVENUE STREAMS | | WE DO THIS | THIS WON'T WORK | WOULD LIKE TO EXPLORE | NOTES |
|---|---|---|---|---|---|
| **Platform access fee** | Delivery of software tools to partners via a platform in exchange for a fee based on set-up charges, annual charges, dealing charges, and/or exit charges | | | | |
| **Payment processing fees** | Percentage-based fee that is charged along with every partner or client payment processed by the OSPG | | | | |
| **Investment Finance** | In cases where the application has a clear commercial return while maintaining the social mission, investment capital may be an important source of capital to achieve scale for sustainability | | | | |
| **Patreon, Open Collective, Github Sponsors, LF Community Bridge** | Funding platforms that allow individuals to support projects through donations | | | | |
| **Crowdfunding Campaigns (Kickstarter, Indiegogo, GoFundMe)** | Platforms that allow for campaign fundraising. May be appropriate for seed funding when projects have appeal to potential funders | | | | |
| **Referral fees** | Fees charged by one project to another for clients referred | | | | |
| **License fee for proprietary modules** | A charge associated with the proprietary version of digital tool | | | | |
| **Corporate sponsorships** | A corporation provides financial contributions to help fund an event for the project. In return, the company earns a public association with the project and an opportunity to reach the program's audience. | | | | |
| **VAS with cloud providers** | In scenarios where cloud providers own the client relationship, opportunity to provide value added services as a service partner | | | | |
| Selling branded merchandise | Can create additional revenue while building brand awareness and community engagement | | | | |

## COST OFFSETS

| TRUE REVENUE STREAMS | | WE DO THIS | THIS WON'T WORK | WOULD LIKE TO EXPLORE | NOTES |
|---|---|---|---|---|---|
| **Volunteer contributors** | A contributor who provides his/her time to the project without a cost association | | | | |
| **Corporate volunteer contributors** | Volunteers sponsored by a company to contribute to the project, without a direct fee charged to the project | | | | |
| **Achieve economies of scale** | A proportionate saving in cost gained by an increased volume of product and service offering | | | | |

## TACTICAL CONSIDERATIONS

| TRUE REVENUE STREAMS | | WE DO THIS | THIS WON'T WORK | WOULD LIKE TO EXPLORE | NOTES |
|---|---|---|---|---|---|
| **Bounties** | A reward – likely monetary – given to a contributor for completing a task in an open-source project. This creates a system whereby the quality of the software can be maintained and improved. | | | | |
| **Board of Advisors** | A strategically appointed board of advisors can assist in access to sources of capital through the network of the members. | | | | |
| **Partner revenue share** | An incentive program for partners where the digital project can share a percentage of revenue when a partner brings in more customers or clients | | | | |
| **Flexible pricing** | A pricing scheme that appeals to categories of clients who may have different valuations of your product. | | | | |
| **Differential pricing (non-profit vs. corporate)** | Offer separate pricing structures to nonprofits and corporate consumers | | | | |
| **Merger** | Combining one or more digital products into a single organization to achieve greater efficiencies of scale and productivity | | | | |

| TRUE REVENUE STREAMS | | WE DO THIS | THIS WON'T WORK | WOULD LIKE TO EXPLORE | NOTES |
|---|---|---|---|---|---|
| **Affiliate marketing** | Online sales tactic that lets a project owner increase revenue by allowing others targeting the same audience (or affiliates) to earn a commission by recommending the product to others | | | | |
| **One Product, two markets.** | A single product positioned to go after both a commercial market and a social market. Choosing to develop a market-use application in addition to the intended social objective can allow the revenue from the commercial application to subsidize the social product. | | | | |
| **Project A pays for Project B** | One project that brings in revenue can support another project that has lower revenue potential. | | | | |

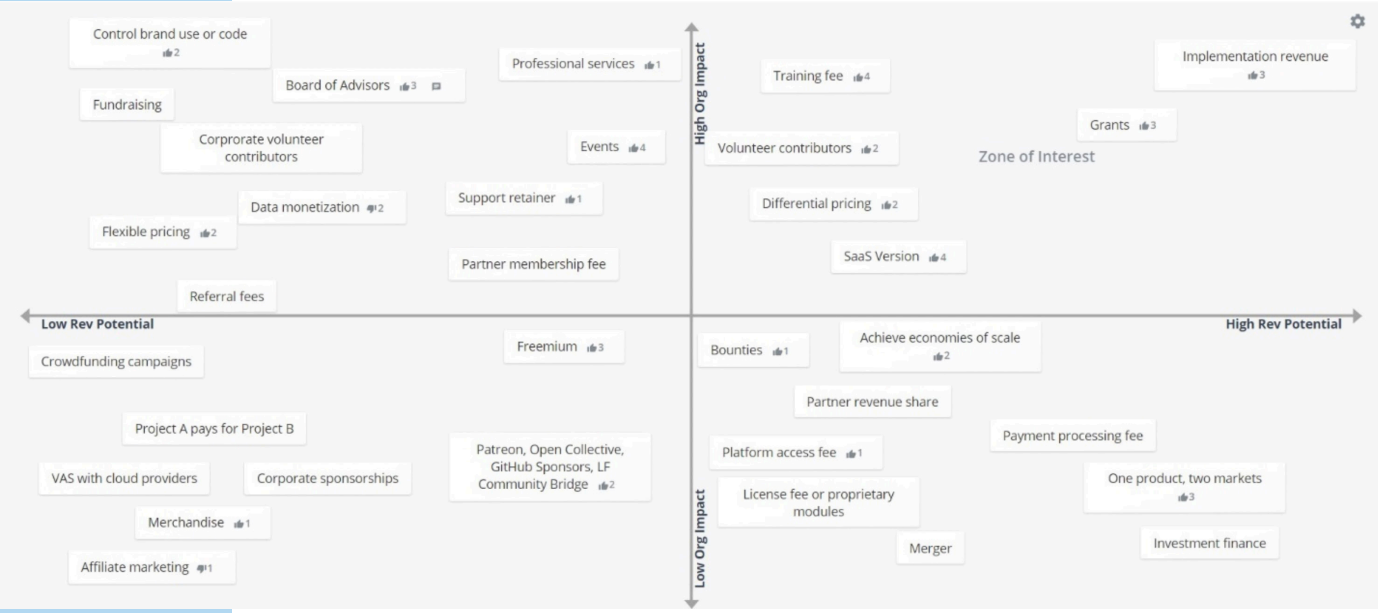
## Exercise 5: Impact/Revenue Matrix

Now that you have thought through some common and diverse ways of generating sustainable revenue for your project, you can plot the tactics on this impact/revenue matrix to reveal where your project should prioritize its business modeling strategy. The upper, right-hand quadrant is the "zone of interest," which will highlight the strategies with most potential for your project to find a path for a sustainable revenue model while maintaining the social impact it was designed for.

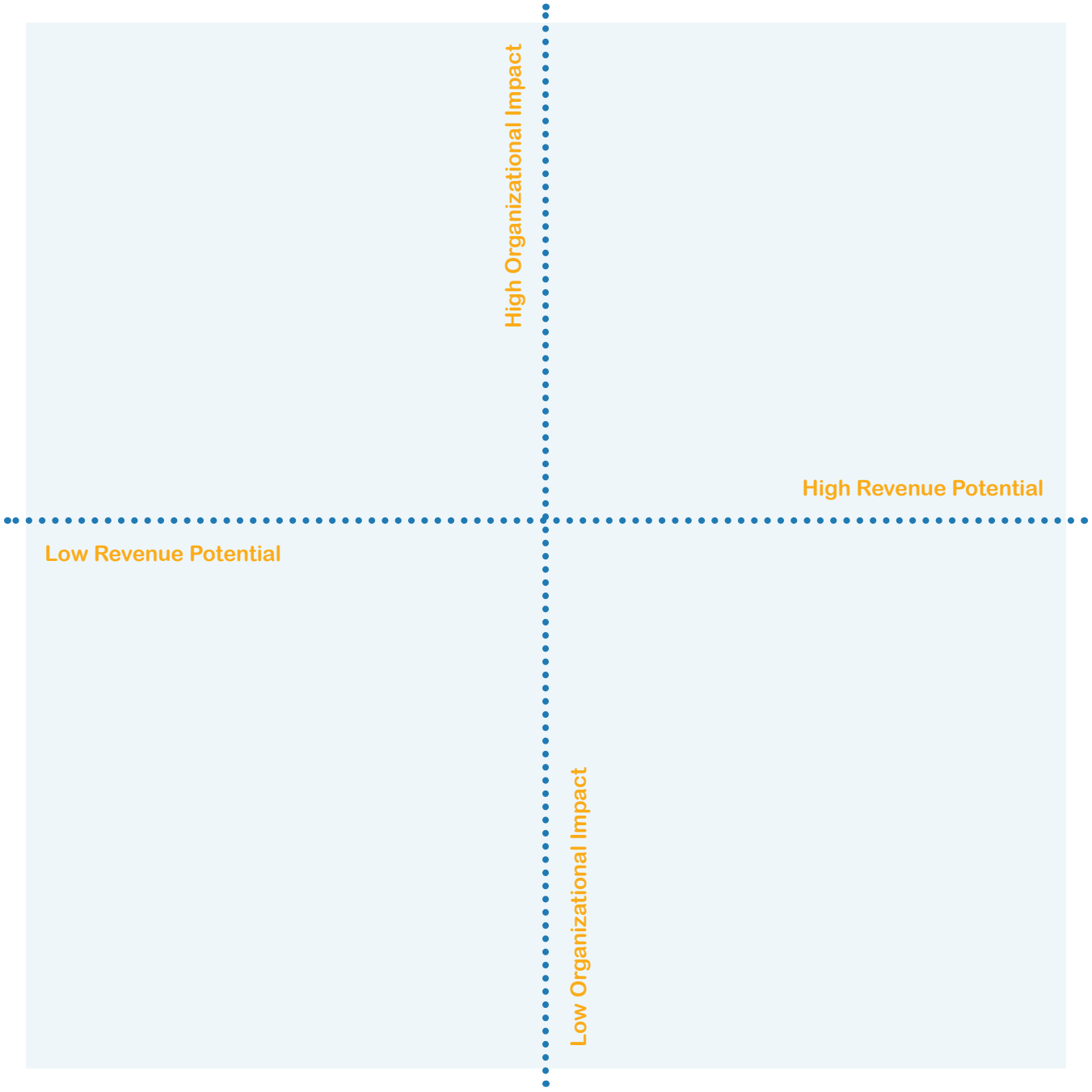
Map each revenue stream, cost offset or tactic on the matrix. Consider each one individually, discuss them with a team of diverse and relevant project members, and keep in mind the following:

- Where is the best placement of each tactic on the matrix, for your project's unique circumstances?
- Which ones offer the highest revenue potential while retaining or improving your organization's intended impact?
- How does each tactic fit with your organizational mandate, its key partners, and current obligations?
- Is there value in pursuing it – keeping in mind the program mission, the needs of the end users, the organizational capacity, and the market positioning?
- What are the risks to programmatic mandate and focus, effort involved, ability to deliver, long-term vision, and the financial implications?

A filled example has been provided for you as well as a blank matrix for you to print and work through.



## Impact & Revenue Matrix




- bounties
- partner revenue share
- corporate contributers
- implementation revenue
- adjacent business revenue
- grants
- trainings & certificates
- referral fees
- platform access fee
- support retainer
- partner membership fee
- merger
- professional services
- corporate sponsorships
- fundraising
- license fee for propriety modules
- monetize brand use not code
- hosted saas version
- hosting commission
- consulting
- project a pays for project b
- flexible pricing
- achieve economies of scale
- volunteer contributors
- tidelift
- data monetization
- payment processing fees
- advertising
- events
- technical support
- vas with cloud providers

## Conclusion

By completing the exercises in this workbook, you have now evaluated your project, identified the basic requirements for a sustainable business model, and explored potential revenue streams. Congratulations! You now have a foundation for your open-source project that is being constructed for sustainability.

But this is just the beginning of your journey towards sustainability. This workbook is an evolving tool and being updated regularly to provide you practical tools to ensure that your project remains sustainable over the long term.

Here's what you can expect from upcoming sections of this publication. We dive deeper into your sustainable business model, including:

- what to include in your financial scenario planning
- how to build a business canvas that incorporates your sustainability considerations
- what to explore when creating a revenue and pricing strategy
- how to choose an organizational home

The final section will be an implementation guide for successful rollout, including considerations of skills and capacity, technical architecture, and legal and intellectual property.

For the latest version of this workbook, please check:
https://hub.osc.dial.community/sust-guide