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Presentation by Greg Newby

WHEN THE FOUNDER IS GONE: LONGEVITY FOR OPEN PROJECTS

Talk outline

- Focus on open, technology-oriented projects (i.e., volunteer-based meritocracies)
- Many projects, big and small, are reliant upon a single Leader
- These projects are at risk, should that Leader be lost
- Are there techniques to mitigate the risks?
- Are there structural limitations to open projects that limit longevity if the Leader is lost?

Abstract & License

- *Abstract:* A single visionary is often credited with shaping innovation and leading to success in open source and open content projects. This success doesn't come from that person alone: he or she leads a corps of willing volunteers, admirers, workers, and others who will turn vision into reality - often with some sort of organizational structure, and across a span of years. This presentation will focus on how to maintain the health and sustainability of such organizations with strong well-known leaders in the event the founder is lost. The presenter will draw upon personal experience with the recent loss of Michael Hart, founder of Project Gutenberg and inventor of eBooks. Every organization is different, and every leader is different. Yet, there are many common characteristics in efforts that started with a single visionary, who led formation of what became a large and successful organization. The presentation will point out some of these similarities and identify some of the promising strategies that have been effective for continuity.

Background: my CCC talk on "Building and Giving Away: Motivations"

- This prior talk lays some of the groundwork for today's talk
- Major thesis: people love to volunteer, to contribute effort to projects. But these volunteers have different motivations, which might not agree with what motivates projects and their leaders
- Slides available here: www.petascale.org/presentations/newby-ccc2011-building.pdf

Motivation

Involved with Project Gutenberg since 1991, I've been Director and CEO of the Project Gutenberg Literary Archive Foundation since 2001

Project Gutenberg was arguably the first online content provider (1971). The Project Gutenberg License (which is a trademark license for "Project Gutenberg," describing and encouraging the Public Domain) dates from 1993 or earlier – the same time as the first GPL.

Transition planning started in 2000 or earlier. Michael died in September 2011.

- Topic: Leadership

Who really leads?

- With maturity, projects naturally develop organizational structure. Typically, some sort of meritocracy-based hierarchy
- The founder/visionary may or may not lead the organization, but is often the thought leader
  - Lots of different organizational structures,, licenses, missions, etc., but that is out of scope for this presentation
- Whatever the Leader's role, they are in many case crucial to keeping the project active

# Sidebar: Are meritocracies doomed to become oligarchies?

- (With thanks to Christopher Hayes)
- The "cult of smartness": tendency to defer to those with more experience, more clout, more social status
  - But are they the "right" people to be in charge?
- But how did the Leaders get to where they got? By
  - Questioning authority
  - Making a ruckus
  - Being unreasonable

By definition, innovation is disruptive!

- "Reasonable people adapt themselves to the world. Unreasonable people attempt to adapt the world to themselves. All progress, therefore, depends on unreasonable people."

  George Bernard Shaw
  "Man and Superman"
  "Maxims for revolutionaries"

- Being unreasonable means being faced with negative social pressure. Most visionaries experience this!
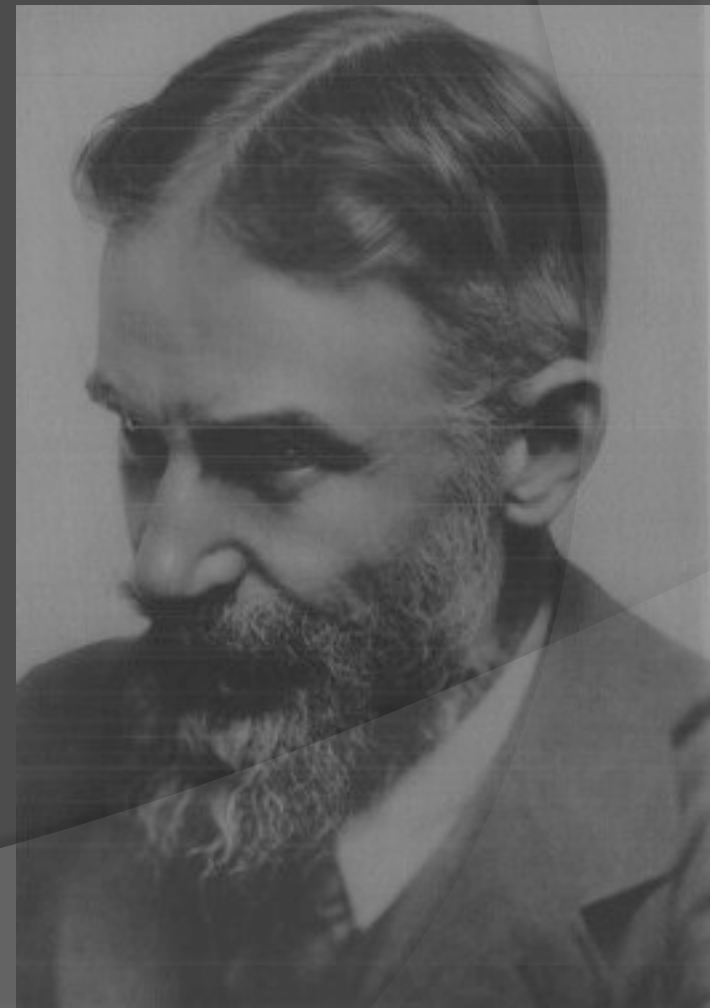
The disconnect

- So: the unreasonable Leader needs to also lead an organizational structure for which s/he is likely not well suited

- Different Leaders seem to have different ways of dealing with this need, such as:
  - Delegate organizational issues to others
  - Transition to "management"
  - Depart and/or spin up another new effort
  - Be disruptive to the organization (temporarily)
  - Pursue rabbit holes, instead of the core activity

- Topic: Risks of success

Leaders come with "Baggage"

- Projects involve effort and commitment, and there are reasons why people choose to make the effort
  - Building a better mousetrap
  - Making the world safer/better/greener/saner…
  - Itching a scratch
- Whatever the motivation, human values are the motivating factors
- The Leader's goals for the project might not align with participants, but this might not matter if the outcomes are aligned

As projects grow...

- More contributors: require organizational structure
- More users, more demand for features; quality control
- Popularity yields competition, criticism (to which the leader might not react effectively)
  - For further reflection: Is there a natural evolutionary process towards being obsoleted?

Money

- Money is needed in some quantity for almost any project
  - Small amounts: for compliance (tax forms, etc.), reimbursing small expenses
  - Mid-size amounts: pay for a small leadership, some travel
  - Larger: Building a company on an open project
- Risk: fighting over money (in many ways!)
- Risk: business models (how to get money, especially for open source/content)
- Risk: what happens to the project if the funding goes away?

- Topic: Risk of loss of the leader

Time happens

- People are often in their 20s and 30s when their project becomes popular, and develops a community

- Many of the most famous Leaders are nearing retirement; some are slowing down for various reasons; others are lessening their involvement

- Each year, dozens of well-known project founders die, or are otherwise forced to cease their involvement

  - By their nature, Leaders care. But, also by their nature, they might not be well-suited for planning the eventuality of their departure

Risks of losing the Leader

- The Leader may have contributed a disproportionate level of effort: loss of work
- The Leader may have been the sole holder of some aspects of the plan, or not have communicated knowledge: loss of ability to move forward
- The Leader may be an important figurehead, associated with the project: loss of ability to get attention
- The Leader may have been structurally important to the organization, such as to manage conflict: loss of stability

Mitigating risk of loss of the leader

- Have a succession plan. Obvious to say, not easy to do. Can be a difficult topic to bring up. Might require people to commit to "step up" to take leadership roles, in addition to their earlier chosen roles
  - This last phrase is key! Meritocracies are not that well-suited to developing Leaders, and visionaries are often not well-suited to ascending hierarchies
- Delegate and distribute the leadership roles, so the Leader is not so critical. Involves having a capable & committed crew, with good communication and agreement

Mitigating risk of loss of the leader

- Identify points of failure, and address them:
    - Does the Leader hold access (i.e., ownership of bank accounts or required passwords)? If so, distribute them to other trusted parties
    - Does the Leader have specialized knowledge? Engage in expressing & sharing that knowledge
    - Can the Leader's moral guidance be transferred?

- Concluding thoughts

Leadership happens

- It is my opinion that many, perhaps most of today's mid- to large-scale projects gain their momentum through luck and timing, not just talent and hard work
- Nevertheless, talent, hard work, and good ideas are necessary ingredients
- Along with good ideas for the project, perhaps this talk has given Leaders of today and tomorrow something to think about concerning leadership, organizational structure, transition planning, and volunteerism

Questions, discussion ideas

- What are some of your opinions on Leadership, and our ability to survive loss of the visionary founder?

- Can you think of counter-examples to what I have described?

- Are there best practices we can follow? Is it realistic to think that the Leaders of which we speak will be likely to follow these practices?

- In the audience, many of us have have our own projects, and dreams of attracting attention and engagement from others. Has this talk given you something to help with your own goals and planning?