

Mojaloop Entity Update



Agenda

- Project Update
- Formation: Where, Who, When
- Entity launch
- Community Management
- Influencer Program
- Next Steps



Creating a New Home for Mojaloop

To maximize reach and ensure the long-term impact of the project, the BMGF is seeking to transition the project and the work under it into a new, independent organization. We seek to bring together a diverse group of industry participants to help drive the creation of this new organization and help ensure it meets its mission-critical objectives, such as:

- Reinforce Mojaloop's Financial Inclusion mission
- Actively reference Level One Project principles
- Evangelize Mojaloop
- Maintain a robust, thriving OSS community to guide software evolution
- Maintain software roadmap and an Agile release program
- Host/Manage the community
- Keep governance lightweight for open source contributors while ensure structure and mission alignment



Staffing and Critical Resources

While strong engagement and sustained contributions from members will be critical to the overall success of Mojaloop, staff and other funded resources will play a fundamentally important role, too. Although staff roles and areas of focus may change as the ultimate structure and set of priorities takes shape through formation, the following roles and functions are suggested:

Staff

- Executive Director, Community Manager

Contracted Resources

- Release Management (Crosslake)
- Development Platform Management
- Event Coordination
- Marketing and Public Relations
- Website Updates and Maintenance
- Governance (Board and Technical)
- Operations, Finance and Accounting
- Legal (retainer for external counsel)



Formation: Where, Who, When

- Legal Status: Gates Foundation working with external counsel on Articles of Incorporation, IRS Filings
 - Location of entity: Wakefield MA mailing address, no formal HQ offices for staff
 - Crosslake to remain onboard for release management
 - Executive Director: Paula Hunter, Interim until full BoD is established and can finalize and approve staffing
 - Community Manager: to be hired once entity is formed
 - Virtual to provide operational support and host key staff
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- **Goal: Launch new entity December 2019**



Sponsor Update

- Ongoing conversations continue with prime targets
- Business plan shared with targets
- Need more data/rationale for why Mojaloop will be successful
 - Market analysis – current and future landscape, key players, etc.
- Need to expand targets, ideally charitable organizations



A Blended Staff and Service Model

- The entity will want to run a lean organization, limiting the number of full time staff to critical functions.
- Expense has been projected for the outsourcing of basic operational and administrative elements, such as accounting services, membership services, technology support, and so forth. These functions can be delivered via an Association Management Service provider.
 - Offers flexible, scalable approach to deliver key business functions
 - Ensures a wide range of skills and trained backup resources
 - If the entity's needs change, the ED can move quickly to add or scale back resources
- Where domain expertise is required, depend on the membership/community to drive and/or specific development grants independent of the entity
- Continue use of Crosslake for the Release Management function
 - Over time, this may be considered a community function



Transition Communications: Situation Analysis

- Until the new entity is launched, and sponsors are secured, the Mojaloop project remains in a transitional state
 - This is likely to extend 3+ months; IRS filings and sponsors are the critical milestones
- Active developers are well entrenched with the community via GitHub, Slack, and the face-to-face convenings
 - Having been directly engaged and/or contracted by the core team members
- Prospective Sponsors are looking for broader information and signs of progress on the project
 - Not likely to “mine” GitHub for details
- Prospective Implementers are looking for more details on the benefits of deploying Mojaloop to their customers
- Companies new to the Open Source Development model are looking for validation that this model is scalable and secure, and need assistance understanding how they engage in this open source project
- We cannot expect all new sponsors, implementers, and developers to engage organically



Transition Communications: Recommendations

- Select a few focused platforms to provide more information about the Mojaloop project
- Do not engage in two-way discussions on these platforms, however, do not prohibit the community from engaging organically
 - Example: encourage participants in convenings to post blogs or case studies on Mojaloop's LinkedIn page
- Leverage Weber Shandwick (WS) team to prep and post content on select platforms with GF approval
- WS work with Virtual Team on entity launch plan and identify roles post launch



Pre Launch Content

- Public Website - Create new page with “Updates” and “Additional Information”
 - Update with details about past and future convenings
 - Post project roadmaps/diagrams from GitHub
 - Address how to engage (for Sponsors, developers, implementers) and provide contact details
 - Progressively add content, similar to what is found on similar sites
 - Continue with WS plan to redefine website for launch
- LinkedIn
 - Add project URL, description of project, more GitHub links and information
 - Mojaloop.io, description from GitHub
 - Post news, mentions of Mojaloop, link to relevant case studies and blogs
- YouTube
 - Post videos prepared by Weber Shandwick team
 - Aggregate relevant clips



January 2020 Convening Support

- Virtual Event team to provide event planning and management support for the January 2020 Mojaloop Convening in the following areas:
 - Venue Search
 - Project Plan, Budget Management and Administration
 - Registration
 - Oversight of all event logistics, including meeting space layout, A/V and Food & Beverage
 - Onsite Event Support



CLA and Community Matters

- New work to be led by Jono Bacon, a well-known OSS industry expert, previously Director of Community at Canonical, XPRIZE, and GitHub, and advises a wide range of organizations, venture funds, non-profit organizations. <https://www.jonobacon.com/about/>
- Perform a detailed assessment of the community, including:
 - Interview team members via phone/video to gather further context and background to help shape the execution of this overall initiative.
 - Review existing published materials (e.g. GitHub repository, website, strategic documents from the team, meeting notes, etc.)
 - Review existing operational programs and materials



CLA and Community Matters

- Deliver an evaluation report complete with key recommendations. Based on the discover phase, prepare an evaluation report that outlines:
 - A summary of findings focused on the discovery phase, presented as a set of key conclusions.
 - Provide a set of detailed, pragmatic recommendations broken into the following key areas:
 - Optimizations for the overall structure of the project and community.
 - Improvements to current infrastructure and workflow.
 - Refining community engagement and collaboration.
 - Effective management of licensing, CLAs, and tracking developer contributions.
 - Building growth of engineering contributions.
 - Integrating key milestones for community reviews and optimizations.
 - Provide a set of broader recommendations for how to break these recommendations into tactical pieces of work, managing work assignments, building buy-in, and executing effectively. This will help the project to get the most value out of these recommendations and translate them into action.



CLA and Community Matters

- Based on these recommendations, provide hands-on coaching to guide the team in executing them. This coaching will be delivered in the following three ways:
 - **Run two educational webinars to train the team and build skills.** The specific topics for these webinars will depend on the output of the discovery phase, but other similar engagements commonly include topics such as an overall introduction to open source, developer workflow, community engagement and growth, and how to build an external community to contribute to the project.
 - **Deliver weekly team calls.** Jono will facilitate 1 - 2 weekly team phone/video calls where the team can discuss this work, ask questions, and continue to evolve their skills. As part of these calls Jono Bacon will provide concrete recommendations for strategic development, solving weekly problems, continued education, and overall skills development.
 - **Deliver weekly coaching via email.** Jono will be available each week to answer questions via email from team members, provide feedback on documents and materials, and provide other input.



Tomorrow's session

- Discussion and Brainstorming
 - State of the market for Mojaloop
 - Deployment opportunities, Sis, long range outlook
 - Education and Awareness
 - What should we build into our plan?
 - Influencer program
 - Other challenges?



Thank You.

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