FOLIO Roadmap Process

Roadmap Definition:

A roadmap is a strategic plan that defines a goal or desired outcome and includes the major steps or milestones needed to reach it. It also serves as a communication tool, a high-level document that helps articulate strategic thinking—the why—behind both the goal and the plan for getting there.

This blog entry describes what a roadmap is and why it is important: Your introductory guide to agile product roadmaps | MindManager Blog.

For FOLIO, the roadmap brings together the priorities described by the FOLIO Project and Community with assumptions about development capacity in order to set goals and milestones for several upcoming releases. The roadmap will help the community plan releases, coordinate resources, and communicate the strategic goals of the project as they relate to feature development. Ideally, the roadmap should address any development related to the FOLIO software, from platform to apps to connections between apps and third-parties. To be explicit, the Roadmap is intended to bridge between the strategic directions and the actual development sequence and priorities.

Although the FOLIO Project does not have direct influence over the work of external developers and teams, we will endeavor to include the goals and accomplishments of these external development efforts in the roadmap when possible.

FOLIO Project: The organization described in the FOLIO Governance Model (https://wiki.folio.org/display/COMMUNITY/FOLIO+Governance+Model) and the resources managed by the Project.

FOLIO Community: The broader global effort to develop, implement, and maintain the FOLIO software.

Themes: Goal-driven groupings of related features, epics or initiatives.

Process:

The FOLIO Product Council (PC), or designated group, will manage an ongoing process to gather requirements and priorities from the community, identify major themes, align these with the priorities identified in the FOLIO Vision, Strategic Objectives and Initiatives or equivalent statements, and integrate them into the roadmap as milestones. As releases come out, the PC will update the roadmap to reflect the realities of development and highlight what has been accomplished. The roadmap should look beyond one year.

The process should involve gathering information from the broader FOLIO community, including the other FOLIO Councils, SIGs, advisory groups, the Capacity Planning team, Tech Leads, external development teams, already implemented institutions, upcoming implementers, and other interested parties.

From this information, the PC will identify themes that best address the high-level needs of the FOLIO Community within the scope of the available development resources. Each theme will encompass the appropriate epics and features that describe the efforts necessary to make the theme a reality, including:

- Feature development
- Architectural/platform priorities and investments
- Strategic priorities
- Tech debt remediation/prioritization
- Cross-app requirements and dependencies
- Testing functionality and APIs
- Dependencies/sequences between development areas
- Performance
- Upgrade processes
- Non-Functional Requirements (NFRs)
- Documentation

The themes should include any relevant external team plans, whenever possible.

In short, the Roadmap will serve to help balance development efforts between near-term functional priorities and longer-term development investments.

The PC should post a draft roadmap for review by the community for several weeks and make appropriate updates before releasing major updates.

Communication:

Once the roadmap is approved, the PC will communicate the roadmap to both internal and external audiences, e.g previous roadmap visualization: https://wiki.folio.org/display/PC/FOLIO+Roadmap?preview=%2F1410538%2F36570735%2FRoadmap+slides+Q1.png

Communication to the Project - TC, CC, Cap planning, Tech leads, POs, SIGs, project members - the PC should actively work with these groups to ensure that the themes identified are understood and clear. Part of this communication will involve grouping and labeling epics and features as part of a theme.

Communication to the Community - implementers, potential adopters, 3rd party organizations - The roadmap should include visualizations that help these communities clearly see the priorities of the FOLIO Project and external development efforts. These outside groups need clear information in order to plan budgets, implementation dates, and to see where they might be able to make an impact on FOLIO development.

Key aspects to communicate:

- What is included on the roadmap - providing clarity of what the current priorities are and how they are established
- What functionality is identified, but not currently on the roadmap - helping the community know they have been heard, even if the functionality can’t be prioritized yet
• Work that is taken on and contributed, but outside or in addition to what is managed by the project
• Progress and accomplishments

Communication channels:
• Product Council
• Product Owner Group
• Scrum of Scrums
• Wiki page
• Folio Forum
• Community Outreach SIG
• SIG meetings
• Newsletter
• E-Mail
• WOLFCon