# Standards Project Lifecycle

## Overview

This lifecycle document is maintained by the LF Energy Foundation ("LFE"), and its purpose is to:

- Describe the requirements for launching a community specification in LFE;
- Provide a clear process for the formation of a community specification in LFE; and
- Set milestones and requirements for different stages of a community specification's development once accepted into LFE.

LFE may adopt or amend this document by votes of its Technical Advisory Council ("TAC") and Governing Board.
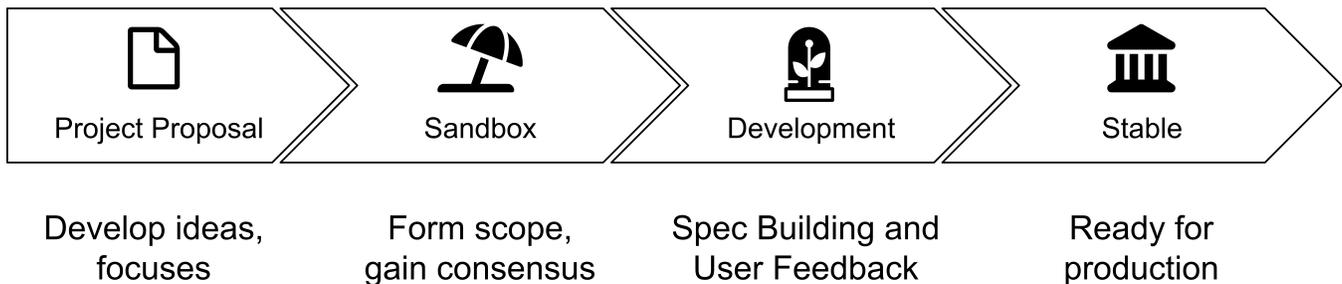
## Examples

- New projects that are designed to extend one or more LF Energy projects with functionality or interoperability libraries.
- Independent projects that fit within the LF Energy mission and provide the potential for a novel approach to existing functional areas (or are an attempt to meet an unfulfilled need).
- Projects commissioned or sanctioned by LF Energy.
- Any project that realistically intends to join LF Energy in the future and wishes to lay the foundations for that transition.

## Stages

This document provides four lifecycle stages for community specifications ("Projects"):

- Sandbox;
- Development;
- Stable; and
- Emeritus

All Projects must meet the Sandbox stage requirements. It is possible that some projects may be approved as Active stage at the same time to advance directly to those stages.



| Project Proposal | Sandbox | Development | Stable |
| --- | --- | --- | --- |
| Develop ideas, focuses | Form scope, gain consensus | Spec Building and User Feedback | Ready for production |

## Sandbox

Projects being submitted to the LF Energy TAC at the Sandbox level are intended to be the entry point for early-stage projects. Characteristics for projects at the Sandbox Stage may be one or more of:

- Early-stage standards efforts that the LF Energy TAC believes warrant experimentation.

- Standards efforts that are designed to complement one or more TAC projects with functionality or interoperability libraries.
- Independent existing standards work that fit the LF Energy mission/vision and provide the potential for a novel approach to existing functional areas (or are an attempt to meet an unfulfilled need).
- Standards efforts that are commissioned or sanctioned by the LFE TAC.
- Any standards effort that realistically intends to become an LF Energy Standards Project in the future and wishes to lay the foundations for that.

Note that the Sandbox stage is common across this lifecycle as well as those for Technical Projects and Working Groups. This enables a project in the Sandbox stage to shift to one of the other lifecycle tracks if the deliverables better align with those lifecycles.

## Requirements

To be accepted at the Sandbox stage, a project must:

- Submit a completed Standards Project Contribution Proposal Template to the TAC, or the TAC's designated recipient for contribution proposals. The proposal should include the following information
    - Name of the proposed standard project
    - Mission statement
    - Expected deliverables
    - Is this an existing standards effort, or a new one
    - Is this related to an existing project
    - Organizations currently participating in the standards effort and/or planning to participate.
    - Any existing materials or assets that will be seeded to the standards project
- Provide such additional information as the TAC may reasonably request.
- Be available to present to the TAC with respect to the project's proposal and inclusion in LF Energy. Project teams should be prepared to present a detailed (20-30 minutes in length) overview of the project in addition to speaking to the information contained in the project contribution proposal.
- Be deemed by the TAC to add potential value or value to the mission of LF Energy.
- Obtain an affirmative vote of the TAC.

## Benefits

The Sandbox Stage benefits are outlined below.

- Neutral hosting of the project's community and any key assets (e.g. trademark, domain, etc.).
- Basic infrastructure support that includes
    - Mailing lists
    - Wiki space
    - Channel on the LF Energy chat infrastructure
    - Access to the video call infrastructure to host the projects Technical Steering Committee meetings.
- A sponsor from the TAC to assist the project in reaching the Active Stage and to facilitate collaboration with other project communities.
- Right to refer to the project as a Sandbox Project of LF Energy, and an opportunity to participate in events and other collaborative activities sponsored by LF Energy.
- Subject to applicable trademark usage guidelines, to display LF Energy's logo on the project's code repository.

## Expectations

Sandbox Stage projects should provide a quarterly report to the TAC outlining its progress on completing the requirements for the Active Stage.

It's expected that projects in the Sandbox Stage move to the Development Stage within one year, or to a post-Sandbox stage of the Techincal Project or Working Group lifecycle if those align better with the deliverables and workstream. In the case of a Sandbox Stage project that is not renewed with LF Energy, the trademark and any other assets will be returned to the project maintainers or an organization they designate.

# Development

Development stage projects are those which have formed and formed and are ready to begin building their initial deliverables. These projects have established governance and scope, which position the project ready to begin collaboration on the standards works.

## Acceptance Criteria

To be considered for the Development Stage, the project must meet the following requirements:

- Have an open and documented technical governance, with the components as defined in Community Specification 1.0 process.
- Complete and approve the Technical Charter and agree to transfer any relevant trademarks to The Linux Foundation or its affiliate, LF Projects, LLC, and to assist in filing for any relevant unregistered ones.
- A project roadmap is defined, which should address the plan for the development of the community specification over the next year.
- Community and contributor growth assessment
    - The current number of contributors and committers, and the number of different organizations contributing to the project.
    - A credible plan for developing a thriving community, in particular expanding the number of committers and contributors?
- Receive the affirmative majority vote of the TAC and of the Governing Board

## Benefits

Development stage projects receive a broad set of infrastructure and open source outreach services to ensure the collaboration can be successful. In particular, Development projects are entitled to the following benefits in addition to those at the Sandbox stage:

- Help to create the project's artwork, website, and other required creative work.
- An LFE blog post or similar announcing the hosting of the project in LFE.
- Right to refer to the project as an "LF Energy Foundation Standard Project," with the right, subject to applicable trademark usage guidelines, to display the LF Energy logo on the project's code repository.
- Appointment of an existing TAC member by the TAC that will act as a sponsor of the project and provide recommendations regarding governance best practices.
- Marketing, communication, and PR support for specification releases and other announcements.
- Events support and promotion, primarily for LF Energy hosted events but also for other events on a best effort basis.
- Access to LFE staff who are eager to help and support the project.

# Stable

Stable stage projects are projects that have produced an initial specification release that has been tested and the feedback had been brought back into the specification. The specification that is being collaborated on by the project would be generally considered a standard ready for mass adoption at this point.

## Acceptance Criteria

To be considered for the Stable Stage, the project must meet the following requirements:

- The specification has no critical issues open.
- A list of adopters of the specification ( either in an ADOPTERS file or other suitable location that is clearly identified ) with at least 3 different products, services, or organizations having adopted the specification.
- An established community for ongoing development and enhancements to the specification.
- Receive the affirmative majority vote of the TAC and of the Governing Board

## Benefits

Development stage projects receive a broad set of infrastructure and open source outreach services to ensure the collaboration can be successful. In particular, Development projects are entitled to the following benefits in addition to those at the Sandbox stage:

- An LFE blog post or similar announcing the specification reaching the Stable stage.
- A voting representative from the project on the TAC.
- Ability to publish the specification with an international standards body, if desired.

# Emeritus Stage

Emeritus projects are projects which the maintainers or the TAC feel have reached or are nearing end-of-life. Emeritus projects have contributed to the ecosystem, but are not necessarily recommended for modern development as there may be more actively maintained choices. LF Energy appreciates the contributions of these projects and their communities, and the role they have played in moving the ecosystem forward.

Projects in this stage are not in active development. Their maintainers may infrequently monitor their repositories, and may only push updates to address security issues, if at all. Emeritus projects should clearly state their status and what any user or contributor should expect in terms of response or support. If there is an alternative project the maintainers recommend, it should be listed as well. LFE will continue to hold the IP and any trademarks and domains, but the project does not draw on LFE resources.

## Acceptance Criteria

Projects may be granted Emeritus status via a 2/3 vote from the TAC and with approval from project ownership. In cases where there is a lack of project ownership, only a 2/3 vote from the TAC is required.

## Benefits

Emeritus stage projects will have a long-term home for the project assets and other materials. Each Emeritus project will have a sponsor from the TAC to monitor any security or trademark concerns raised, and at the TAC's discretion may address them. LFE will remove the promotion of Emeritus projects from its website and other promotional materials.

# Annual Review Process

The TAC will review each project on an annual basis. This review will gauge whether the project is still at the correct maturity stage based on the criteria for the current stage.

Projects will schedule their annual review as part of the next TAC meeting following the anniversary of the project's acceptance. Projects should prepare a short presentation that covers the following points, which the TAC will use in its review of the project:

- The current activity of the project, including releases, adoption, and committer/contribution growth and diversity.
- Assessment of whether the project is fulfilling the requirements for the project to remain at its current stage, or be considered for a different stage
- Feedback on its experience as an LF Energy project, including benefits from being an LF Energy project and areas that the TAC and LFE staff can better support the project.

Annual reviews require a majority affirmative vote of the TAC for the project to continue at the current stage or the appropriate number of votes to move to the next stage. If the TAC deems the project to not be currently meeting the requirements of the current stage, it may vote to move the project to the appropriate stage or Emeritus stage. The project may choose to move outside of the LFE at any time.