To: **David Sarley, Tim Wood, Anna Rapp, Kaleb Brownlow**

From: **OpenLMIS Product Committee
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 Lindabeth Doby (USAID)

Date: **March 1, 2016**

Re: **Coordinated OpenLMIS Funding Asks**

Countries and partners have expressed a high degree of interest in quality logistics and supply chain solutions. We, as members of the OpenLMIS product committee, are committed to improving the features available in OpenLMIS so that the system consistently addresses country needs, and can be readily deployed in additional countries or expanded in existing countries.

In response to to country interest, several projects have been proposed, with sometimes overlapping functionality. Realizing the Bill and Melinda Gates Foundation and other donors would like investments contributed to a common good, and to avoid duplicative development, this memo seeks to provide preliminary guidance on how the committee is coordinating these development efforts.

**Product Committee Structure and Project Review Process**

Currently, the product committee consists of five members and meets on a bi-weekly basis to provide input into the product roadmap. In the spirit of transparency and coordination, all committee meetings are open and the activities recorded. The product committee recognizes that a clear process for vetting project proposals needs to be defined. To this end, we have recently introduced a process to review new project proposals for global requirements, to investigate cross-country demand for features, and to inform what features belong in the core OpenLMIS product. Once we’ve matured this process, our hope is that funders can use the outputs of this process as a way to understand how project proposals fit into the OpenLMIS roadmap. Moving forward, the product committee will establish a backlog of features appropriate to the OpenLMIS domain and prioritize it based on country and donor interest.

**OpenLMIS Re-architecture**

The OpenLMIS re-architecture is required to **better** **enable contribution** and **maximize shared benefit** by promoting code reuse and transferrable customizations while simultaneously providing the ability to maintain and modify a stable OpenLMIS Core.

This includes maintaining processes, policies and technical support for the contribution of features and fixes to OpenLMIS. Transferrable customizations—modules—are a mechanism for projects to build non-global features that may be applied to future versions of OpenLMIS, thereby easing the upgrade or migration process. There are currently two proposals being discussed for the re-architecting OpenLMIS, an incremental re-factor of the existing code base and a re-write. Both have positive and negative aspects which can be investigated on the [OpenLMIS Re-Architecture Concept Note](https://openlmis.atlassian.net/wiki/display/OP/Re-Architecture%2BConcept%2BNote). For the sake of this memo, we do not distinguish between the two approaches.

**Overview of Future Project Proposals**

The product committee provides guidance on projects in the form of assessment of domain fit, knowledge of the existing country demands for such projects, and what other similar projects have been undertaken or are currently underway, as well as supporting projects based on prior investments and learning. Contributions to core OpenLMIS functionality need tight coordination, especially during the re-architecture. Partners represented on the product committee have been closely coordinating for various projects since the beginning of 2015, and will continue to do so as new feature sets and projects are introduced.

Three current product proposals are listed below, including recommendations on how tightly coordinated they must be with the OpenLMIS re-architecture:

***White Label Mobile App***

Based on multiple requests from countries for a facility-level stock management system, with largely overlapping requirements, CHAI and Thoughtworks have proposed a reusable “white label” LMIS Android Application for facility stock management on OpenLMIS. The application will carry core functionality of field stock management, and provide flexibility to configure and customize features for different country implementations at relatively lower cost.

Targeted for the OpenLMIS global product, the project will require substantial coordination with the re-architecture work to ensure dependencies on the global product are appropriately considered during software development. The application will leverage learnings from the current development of a similar facility stock management app in Mozambique, being developed by ThoughtWorks and CHAI, in close collaboration with VillageReach. The Mozambique codebase will be extensively used for the development of the white label app, with an initial requirements gathering process across countries who have expressed interest – including Uganda, Malawi, Zimbabwe, and Nigeria – to ensure applicability across contexts.

The three organizations successfully worked together to coordinate dependencies for the Mozambique work, including the process for interface definitions and back-end API support to extend OpenLMIS’s core functionality for the application. The white label app project will adopt a similar strategy for coordination and successful software development. A detailed plan for project alignment and timing will be made available as additional details on the re-architecture approach are confirmed. As there are continual requests for an offline mobile interface to OpenLMIS, we see this as a core functionality to invest in now.

***Tanzania Visibility Analytics Network (VAN)***

The objective of the Visibility and Analytics Network (VAN) concept in Tanzania is to operationalize OpenLMIS investments thus far by empowering decision makers with the data they need to make decisions and facilitate the continuous process improvement envisioned by the global VAN. Additional software development contributing to the Vaccine Information Management System (VIMS) is a minor aspect of the VAN.

While there is interest by other countries in the functionality represented in VIMS, it has been conducted as a country-led project through the local offices from JSI, CHAI, and PATH. There has been global technical assistance (including early stage development from VillageReach). While the planned functionality is intended to be project-specific, it will be made publically available for other countries to reference or modify as they see fit. However, it has not been scoped as a contribution to the global OpenLMIS project.

As a country specific project, there is not a dependency on this proposal for the re-architecture project. Therefore, our recommendation is to move forward with VAN as a country-specific project. The requirements from the VIMS and VAN project can be cross-leveraged for the OpenLMIS Vaccine Functionality project described below. The VIMS project has already succeeded in bringing together several diverse organizations (VillageReach, JSI, CHAI, PATH) to work collaboratively towards a common goal. This experience can be further leveraged for the Tanzania VAN project, a partnership of the same organizations.

If the Bill and Melinda Gates Foundation wants an assessment of what would be required for the VAN Tanzania software development to contribute to OpenLMIS global, that analysis could be conducted after the re-architecture decision is made.

***Vaccine Functionality***

Similarly, we are seeing significant demand for additional functionality in OpenLMIS incorporating best practice features for vaccine management into the product. The goal of this piece of work – originally proposed by VillageReach – is to develop reusable vaccine functionality and not to perpetuate custom built solutions for additional countries. We will approach this by using the CRDM for vaccine management developed under the IBID initiative as a baseline for global requirements. Similar to the mobile app, this project requires substantial coordination with the re-architecture project.

In order to ensure the resulting development has global applicability and is globally-reusable, this project proposes to conduct requirements analysis across several countries and to engage additional global stakeholders (Gavi D4M PWG, UNICEF, WHO, etc). This process will build on the initial set of requirements documented in Tanzania, Mozambique, and Benin and continue to leverage the learning from the BID Initiative. In order to synch with the re-architecture timeline, the requirements work would ideally happen in 2016 with software development beginning in 2017.

Since EPI programs to date have generally used the same Excel-based tools for vaccine program data, there is considerable standardization in the requirements across countries. Investment in this core functionality would decrease the amount of funding needed to implement vaccine-specific LMIS at the country level. A number of countries have expressed interest in this functionality, and we believe there will be interest from other donors and partners that support EPI programs. Considering the current global investment in strengthening data management and supply chain for EPI programs, we expect to see a proliferation of new country-level vaccine-specific LMIS investments in the coming years. We would like the OpenLMIS community to be positioned to support that demand at a lower cost to countries through flexible and configurable vaccine functionality.

**The Way Forward**

Additional details on the projects referenced above can be found on the project wiki at [https://openlmis.atlassian.net/wiki/display/OP/Product+Committee](https://openlmis.atlassian.net/wiki/display/OP/Product%2BCommittee). Coordination plans upon the completion of the re-architecture recommendations will be made available later in March.

We greatly appreciate the support you have provided to the OpenLMIS community. Please let us know if and by when you would like to receive further details on project coordination efforts, including cross project dependencies, high level resource requirements, and development timeframes for each effort.