Proposal for FDX Program

Responsibilities and working streams

Background and history

The FinServ Developer Experience Program within FINOS is seeing an increasing interest as a venue to tackle, discuss and progress on common challenges within the Financial Services industry, specifically around communication, collaboration and development around open source software.

In the last month, the Open Developer Platform Working Group - led by Diane Mueller and composed by Brian Ingenito and Maurizio Pillitu - have made good progresses consolidating a prioritized backlog of issues and start tackling frictions that prevent firms (in particular banks) to contribute to FINOS activities (projects and working groups).

On September 27 2018, Gab (FINOS Executive Director and Program Liaison) shared a proposal to revamp the organization of the FDX Program, to also revive other areas that were initially mentioned in the original program proposal, specifically the **Developer Experience** and **Containerised Architectures** working groups.

On October 9 2018, the FDX PMC have gathered and discussed further the proposal, see meeting notes; this document summarises the proposal, including the changes that have been discussed.

Objectives

Overarching objectives for the proposal are to drive faster progress for the FDX program using a divide and conquer approach and ensure community has the opportunity to provide input in choices made for Foundation infrastructure and Open Developer Platform. More specifically we believe this proposal helps to:

1. Cohesively divide working streams within FDX
2. Assign clear responsibilities and ownership for the different work streams, in alignment with each contributor interests and availability
3. Provide a clear path for ODP requirements coming from other FINOS Programs, FINOS Members & the marketplace to be agreed upon & prioritized for implementation in ODP
4. Being able to clearly articulate and communicate who does what and where for each work stream so that FINOS can rally up interest of the Community

The Proposal

With this in mind, the proposal is to:

1. **Start the Developer Experience (DX) Working Group**, led by GitHub, to collect, discuss and refine requirements around the development workflow, from source code access to testing and continuous integration. If changes are required to ODP (e.g. developer authentication), this group would discuss and produce requirements in the ODP [prioritized backlog](#). Existing bi-lateral (e.g. MS and GS) or ad-hoc (e.g. Focus Group) efforts can be funneled into this work.

2. **Rename the Containerised Architectures into FSI Cloud Native Working Group**, led by Red Hat, with the objective to collect, discuss and refine requirements around the use of containers for building and running financial workloads, common cloud challenges and reference architectures; If changes are required to ODP, this group would discuss and produce requirements in the ODP [prioritized backlog](#) (e.g. need for a container based orchestration platform). Once a charter and initial focus has been defined, FINOS can help gauging interest in the community.

3. **FINOS Staff will own efforts to remove frictions around collaboration services**, including mailing lists, wiki, chat and other collaboration tools. Given FINOS daily interaction with contributors in our functions of Program and Member success, we believe it's our responsibility and we are best positioned to offer a fully accessible independent infrastructure for collaboration. When requirements are clarified, tasks will be created in the ODP [prioritized backlog](#) to provide visibility and transparency to the ODP WG and Community.

4. **ODP Working Group purely meets to prioritize backlog and it's open to anyone** who wants to join to "lobby" for issue prioritization. though delegating requirement refining to the new FDX working groups; this will allow continuity with the work done by the group so far and avoid confusion within the community that is already following this effort since its start.

Responsibilities

	Responsible	**A**ccountable	**S**upport	**I**nformed
Removing frictions for collaboration tools accessibility from banks	FINOS	FINOS	Vendors	Community
Host an ongoing venue for banks collaborating on OSS development workflow	DX	FINOS	FINOS	Industry

Host an ongoing venue for banks collaborating on Cloud native challenges, architectures and tools	FSI Cloud Native	FINOS	FINOS	Industry
Prioritize work on ODP	ODP Working Group	FINOS	Gab	FDX Program
Promote participation and attendance to DX and FSI cloud native	WG Chairs	FINOS	FINOS	Community
Propose developer workflow and technology changes in ODP	DX	FINOS	FINOS	Community
Propose deployment workflow and technology changes in ODP	FSI Cloud Native	FINOS	FINOS	Community

Examples

A few examples are provided here to exemplify how different scenarios play out in the new proposed organization:

1. A Program or Member express a certain requirement (new technology, API, data stream, integration, etc) added to ODP. Approach:
   a. Program or Member raises an ODP Jira
   b. If further information is required, Program or Member joins the ODP Working Group to answer further questions
   c. If requirement relates to development, ODP WG might (optionally) suggest to follow up with DX
   d. If requirement relates to cloud deployment, ODP might (optionally) suggest to follow up with FSI-CloudNative
2. A contributor or Member cannot access a collaboration tool. Approach:
   a. FINOS infra will perform due diligence and validate the issue
   b. Based on further member success data, surveys and qualitative information FINOS infra will create a task to address the issue
   c. Task will be prioritized as part of ODP WG
3. A Member or contributor would like to discuss with another Member or contributor on their specific challenges. Approach:
   a. If development related, propose to put on the agenda for next DX WG
   b. If cloud native related, propose to put on the agenda for next FSI cloud native WG
   c. If collaboration (wiki, mailing lists, chats, etc) related, FINOS will connect bi-laterally

Proposed Initial Roster

	Chair / Lead	Co-chair	Participants
DX WG	Jamie Jones (Github)	N/A	Focus group (GS, MS, JPM, DB, etc)
FSI Cloud Native WG	Diane Mueller-Klingspor (or ???) (Red Hat)	N/A	MS, TBC
ODP WG	Maurizio PIllitu	Brian Ingenito (Morgan Stanley)	Case by case
FDX PMC	Jamie Jones (Github)	N/A	FINOS, Red Hat, MS, Github

Actions

If the proposal above gets approved, the following actions can start ASAP:

1. **DX**
   a. **Github identifies Chair (Jamie?)**
   b. **GitHub defines initial focus and announces DX WG activities**;
   c. **Soft funnel focus group into WG:** there is already a group of people from FINOS (bank) members that gathered around August/September and shared common challenges (aka ODP Focus Group), which may include someone interested to help and get involved in more recurrent activities
2. **FSI Cloud native**
   a. **RH identifies Chair (Jamie?)**
   b. **RH to present charter and initial focus back to PMC;**
   c. **RH starts and announces the FSI WG activities**; and Foundation support with engagement strategy. To date the lack of a clear focus prevented growing interest at least from banks; that said, we expect this to change soon, based on:
      i. **An upcoming release of FDC3 standards**; they may decide to use containers as a way to distribute samples
      ii. **Voice Program SDKs**, which already (partially) ship as Docker containers and are interested to know more on how ODP can make their life easier

      iii.   **New approved Programs** like Data Visualization and Decentralized Eco-systems, which may be using containers as part of their architectures

3. **FINOS Infra reviews the ODP Working Group documentation** and ODP collateral
   a. Implement minor changes to describe the relationship between the different FDX working groups; in particular, the FDX landscape diagram must be updated to reflect changes on communication channels and dynamics
   b. Revamp website documentation to clarify scope and responsibilites of the Program and how to engage with ODP