LF AI Projects: Process and Lifecycle

1. Overview

The document is maintained by the Technical Advisory Council ("TAC") of the LF Artificial Intelligence Foundation ("LF AI"), and has been approved by both the TAC and the Governing Board of LF AI ("GB"). This document may be updated by the affirmative vote of both the TAC and the GB.

Projects may apply to join LF AI by completing and submitting this template maintained on the LF AI website (the "Project Contribution Proposal"). Projects are expected to come into the foundation as Incubation projects and then move into Graduation at a later point.

A vote of both the TAC and the Governing Board is required for a project to be accepted into The LF AI Foundation. If voting quorum was not achieved during the call or meeting aimed to accept a project at the Graduation level, that agenda item will be pushed to the next scheduled call or meeting for that specific committee (TAC or GB). Alternatively, it is an option to get the TAC votes via email to avoid pushing the vote to the next call or meeting.

2. Project Proposal Process

Introduction

This policy sets forth the proposal process for projects to be accepted into the LF AI Foundation. The process is the same for both existing projects which seek to move into the LF AI Foundation, and new projects to be formed within LF AI.

Project Proposal Requirements

Projects must be proposed via GitHub by adding the proposal to https://github.com/lfai/proposing-projects/tree/master/proposals and notifiying LF AI staff by emailing info@lfai.foundation with the subject "PROPOSAL [project name]".

The template for project proposals must provide the following information:

1. Name of project or proposed name of project (must be unique within LF AI)
2. Requested project maturity level: Graduation or Incubation stage
3. Project description (what it does, why it is valuable, origin and history, ongoing development, roadmap, etc.)
4. Statement on alignment with LF AI's mission
5. License name, version and URL to license text

6. Source control (GitHub, etc.)
7. External dependencies including licenses (name and version) of those dependencies
8. Initial committers (name, email, organization, and how long have they been working on project)
9. RACI matrix ("responsible, accountable, consulted and informed") if applicable / exists
10. Infrastructure requests needed as part of hosting at the LF AI (CI / cluster requirements)
11. Mailing lists currently in use
12. Issue tracker (GitHub by default) and other tools utilized
13. Project website
14. Project governance structure and officials
15. Release methodology and mechanics
16. Social media accounts
17. Existing sponsorship (e.g., whether any organization has provided funding or other support to date, and a description of that support), if any

A proposal template is available from
https://github.com/lfai/proposing-projects/blob/master/proposal-template.adoc.

Project Acceptance Process

There is a four--step process for submitting a project proposal and driving it for approval.

- **Step 1:**
  a. The project prepares a proposal based on the provided template and submits it via GitHub to https://github.com/lfai/proposing-projects/tree/master/proposals along with a short email to info@lfai.foundation, with the subject "PROPOSAL [project name]"
  b. The project represented by its founding company must sign and submit a copy of the Trademark and Account Transfer Agreement; the goal of this agreement is to transfer ownership of the project trademark and admin rights to projects accounts to the Linux Foundation
  c. LF AI staff notifies the project whether the proposal appears to be ready to present to the TAC and will work with the project on finalizing the proposal for TAC submission, review, and vote

- **Step 2:**
  a. The project will be invited to present to the TAC during the bi-weekly meetings via a conference call
  b. The speaker(s) will be allocated 45 minutes to present:
    ■ An overview on the project, development roadmap, community stats, relation to other projects, information on users and contributors to the projects, etc.

      ■   Proposal to host the project under LF AI following the proposal submitted via GitHub

    c. The presentation file must be delivered to LF AI via info@lfai.foundation at least 3 business days prior to the scheduled conference call to allow enough review time for TAC members

    d. The TAC will have 15 mins for discussion with the project representative, followed by a vote that determines the acceptance of the project and the stage at which the project will be hosted in LF AI

- **Step 3: If the project is approved by TAC at Graduation level**
  a. The proposal is then forwarded to the GB for approval
  b. The project representatives will be invited to the next GB conference call for a short presentation (10 mins) followed by a vote by the GB to accept a project at Graduation level

- **Step 4: Announcement and onboarding**
  a. Announcement of project hosting under the LF AI via either a blog post or a press release
  b. Onboarding the project following the steps highlighted in Appendix A

3. Project Stages: Definitions, Expectations and Acceptance Criteria

Incubation Stage Projects

Definition

The Incubation Stage is designated for new or early-stage projects that are aligned with the LF AI mission and require help to foster adoption and contribution in order to sustain and grow the project. Incubation projects will receive mentorship from the TAC and are expected to actively develop their community of contributors, governance, project documentation, and other variables that factor in to broad success and adoption.

Projects in the Incubation Stage are generally expected to move to Graduation Stage within 12-18 months following an evaluation by the TAC committee.

Acceptance Criteria

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

- The project uses an OSI-approved open source license

- The project does not have dependencies on components that are either proprietary or licensed under a non OSI-approved license
- Submit a completed Project Contribution Proposal to the TAC via a Github pull request (https://github.com/lfai/proposing-projects/tree/master/proposals) along with a short and a short email notification to info@lfai.foundation
- Provide such additional information as the TAC or GB may reasonably request
- Demonstrate a substantial ongoing flow of commits and merged contributions
- Have a healthy number of committers. A committer is defined as someone with the commit bit; i.e., someone who can accept contributions to some or all of the project
- Be deemed by the TAC and GB to add value to the artificial intelligence, machine learning and/or deep learning space and to fall within the mission and scope of LF AI
- 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. In the case of projects with established trademarks where a trademark transfer is difficult, we generally recommend the project begin operations under a new name. Note that no patent or copyright assignment is necessary in order for a project to join LF AI effort

Benefits

- The project has the right to refer to the project as an "LF AI Foundation Incubation Project"
- Appointment of an existing TAC member that will act as a sponsor of the project and provide recommendations regarding governance best practices
- Promotion of the project, new releases via the LF AI blog and social media channels
- Access to LF AI booth space at various events for demo purposes based on availability
- Collaboration opportunities with other LF AI projects

Remarks

- If a project does not move from incubation to graduation within 18 months of joining LF AI, the TAC needs to revisit the project, support the project on meeting the graduation requirements or consider moving the project to Emeritus stage

Graduation Stage Projects

Definition

Graduation stage projects are projects that are aligned with the LF AI mission and have achieved significant growth of contributors and adopters, are important to the ecosystem, and are eligible for foundational financial support.

Acceptance Criteria

To be accepted as a Graduation Stage, a project must meet the Incubation Stage requirements plus:

- Have a healthy number of committers from at least two organizations[1]
- Have achieved and maintained a Core Infrastructure Initiative <u>Best Practices Badge</u>
- Demonstrate a substantial ongoing flow of commits and merged contributions
- Document current project owners and current and emeritus committers in OWNERS.md and COMMITTERS.md files; copy of the project's charter (or other authorized governance document) shall be included or linked to in a GOVERNANCE.md or in a similar file
- Receive the affirmative vote of two-thirds of the TAC and the affirmative vote of the GB

Benefits

- The project has the right to refer to the project as an "LF AI Graduation Project", which signals to the market that the project has reached a high level of technical maturity with confidence in its and readiness for deployment
- Projects designed as Graduation Projects by the GB get a voting seat on the TAC
- Promotion of project, new releases via LF AI blog or press release, and social media channels
- Graduation projects are eligible to request and receive support contingent on GB approval. The ability for a company to be represented on the GB and influence the internal GB process is highly beneficial to projects making such requests
- Priority access to LF AI booth space at various events for demo purposes
- Graduation projects have a technical lead appointed for representation of the project to the TAC
- Collaboration opportunities with other LF AI projects

Emeritus Stage Projects

Definition

Emeritus projects are projects which the maintainers 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. The Foundation appreciates the contributions of these projects and their communities, and the role they have played in moving the ecosystem forward.

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[1] Since these metrics can vary significantly depending on the type, scope and size of a project, the TAC has final judgment over the level of activity that is adequate to meet these criteria.

Expectations

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. The foundation will continue to hold the IP and any trademarks and domains, but the project does not draw on foundation 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.

4. Annual Review Process

The TAC will undertake an annual review of all LF AI projects. This annual review will include an assessment as to whether each Incubation Stage project is making adequate progress towards the Graduation stage and whether each Graduation Stage project is maintaining progress to remain at Graduation level.

The suggested time frame for the review is to start on September 1st and ends on October 31st 1 and should end by Oct 31 with a set of recommendations for each project to improve and/or a recommendation to the GB on moving a project across stages.

Projects can be provided with an extension of time in their stage (up to the discretion of the TAC).

Any project may be moved to Emeritus stage by affirmative vote of the TAC, provided that the transition has secured:
1. An affirmative ⅔ vote of the TAC
2. An affirmative ⅔ vote of the GB

Appendix A - Onboarding New Projects

Upon new project approval, the following can be expected. Additional details and timing for each activity will be provided to the project by LF AI staff.

- Infrastructure
  - Onboarding call with LF AI staff to review resources and LF AI Getting Involved Guide
  - Finalization of legal documents (assignment agreement, trademark, technical charter, etc.)
  - Logo adoption and transfer of website/domain
  - Project added to LF AI GitHub plus repository migration
  - Project added / updated to LF AI Landscape
  - CI/Build environment setup (graduation only)
  - Project mail lists provided in LF AI Groups.io
  - Project space provided on LF AI Wiki
  - Set up of other collaboration tools (Zoom, Chat, etc.) as applicable/approved
- Governance
  - Definition of initial project governance, maintainers, or project leads
  - Assistance with kickoff TSC/Project meeting, TAC sponsor included
  - Recommendation on next steps based on TSC charter (chair election, technical community document, code of conduct, etc.)
- Marketing
  - Project added to LF AI website
  - Announcement (press release or blog post) coordination
  - Social promotion of new project announcement
  - Inclusion in upcoming events as applicable

As the LF AI Foundation grows and scales some items may be modified, please contact the LF AI staff for the most up to date details or other questions. Contact at info@lfai.foundation.

Appendix B - Services for LF AI Projects

In a world where GitHub use is ubiquitous, it is no longer sufficient for a software foundation to offer just a software repo, mailing list, and website. An enhanced set of services is required as it facilitates increased adoption. The list below represents a summary of the main services that LF AI provides to it hosted projects. The specific services depend on the stage of the project and to be discussed directly with LF AI staff.

Foundation

- Offers a neutral home for the projects which increases the willingness of developers from other enterprise software companies, start-ups and independent developers to collaborate, contribute, and become committers
- Provides a funding model to support the projects
- Leverages the expertise of its parent organization, The Linux Foundation, which hosts other successful projects
- Supports projects in documenting their technical governance or adopt a new neutral governance
- Creates opportunities for LF AI participants to be part of cross-project developer days
- Offers access to dedicated staff who are eager to assist in myriad ways and help the project be successful

Event Management

- Events are a part of LF AI's core strategy and they help your project build a community with face-to-face interaction and knowledge sharing
- Host multiple LF AI Days
- LF AI engages with the events of its parent, the Linux Foundation, which are called Open Source Summits (OSS) and held every year in North America, Europe, Japan, and China, as well as the invitation-only Open Source Leadership Summit
- LF AI assists with sponsorship leads, media introductions, co-location opportunities and marketing of the event
- LF AI promotes LF AI projects and help connect users and developers to other LF AI projects
- Project contributors are welcome to use LF AI booth as a "home base" for meeting colleagues
- LF AI provides a number of marketing services to support community and ecosystem engagement

Marketing Communications

● Generate positive media and analyst coverage to create greater awareness of project milestones, community growth, and developer engagement
● Promote project news and milestones through other channels: journalists, analysts, and news releases/blogs
● Develop thought leadership reports, surveys, success stories, and case studies

Legal Support

● Access to LF AI and LF staff should any legal questions arise
● Assignment of trademarks to the Foundation
● Bi-monthly source code scans for license compliance purposes

Support in China

● We have a professional staff located in China that can help your project present at local meetups and events