



Operations Plan

January 1, 2016- December 31, 2016

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Executive Summary

During the last decade, the OpenMRS community has matured to become a robust organization. As a result of this maturity and the growing engagement of the community, the leadership of OpenMRS has recognized the need for delineation of annual as well as future goals. This goal setting is coupled with the identification of the operational and fiscal support needed to meet these goals as well as our mission.

The following 2016 OpenMRS Operational plan reflects the goals of the community, informed by hours of volunteer contributions over the last three months. The six Strategic Goals include an increased commitment to deliver high quality software that meets the needs of the end users with a focus to develop and evolve the platform ([Strategic Goal 1](#)); develop and evolve the community reference application ([Strategic Goal 2](#)); improved attention, identification and support of best practices for distributions ([Strategic Goal 3](#)); increased commitment to education to support OpenMRS ([Strategic Goal 4](#)); support for implementations through development of effective service providers ([Strategic Goal 5](#)); and, finally, maximized efficiency and effectiveness of the community through enhanced operational infrastructures ([Strategic Goal 6](#)).

The OpenMRS leadership is pleased to present this plan to the OpenMRS Inc. Board of Directors (BOD) as well as the OpenMRS community. OpenMRS leadership will be tracking the interim goals included here; we will issue a quarterly update to the OpenMRS Inc BOD as well as the community on our achievements as well as identified obstacles. We look forward to ongoing and increased engagement as we strive to achieve our mission and write code to save lives.

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Organizational Overview

OpenMRS Mission Statement

The mission of OpenMRS is to improve health care delivery in resource-constrained environments by coordinating a global community that creates a robust, scalable, user-driven, open source medical record system platform.

OpenMRS values patient care as the basis of everything we do.

We are **User-Centered**

Design decisions are driven by real, not perceived needs.

Our software works in the most challenging health care delivery environments.

We create a platform that is adaptable to the unique needs of our users around the world.

We are **Open**

We are open, honest, and transparent in both our processes and our software.

Our software serves as a platform that empowers both users and implementers to innovate.

We publicly document and share our knowledge, skills, experiences, and failures.

We are **Community-Driven**

We believe the best ideas come from people with different backgrounds and talents, and we build a community where these people can come together and innovate.

We believe in harnessing the wisdom of our software development community by creating a safe place to raise concerns, discuss failures, improve existing ideas, and solve problems.

We envision a world where:

Models exist to implement health IT in a way that decreases costs, increases capacity, and lessens the disparities between wealthy and resource-poor environments.

Open standards enable people to use health IT systems to share information and reduce effort.

Concepts and processes can be easily shared to enable health care professionals and patients to work together more effectively.



Medical software helps ease the work of health care providers and administrators to provide them with the tools to improve health outcomes all over the world.

Governance Structure

The OpenMRS Governance structure is important to the development and achievement of the operational plan. Governance describes how OpenMRS "works" as a community. This section describes the various roles within our community process, and how our community process encourages everyone to contribute and influence what we do and how we do it. This structure has been documented in an [OpenMRS Community Governance Model](#) but is briefly outlined below as well.

Community activities are facilitated through a meritocratic process. OpenMRS functions as an interdependent community, dependent upon the talents of a diverse global community. As a result of this interdependency, we have established high standards for collaboration, debate, delegation of responsibility and ethics. Anyone with an interest in what we're doing and who believes in our mission can join the community, contribute to the project design, participate in the decision making process, and hopefully have a lot of fun in the process.

The OpenMRS community management team is comprised of OpenMRS Directors, Managers, and the Project Leader. The community management team ensures the smooth running of the community. Members of the community management team are expected to participate in strategic planning, resource raising/allocation activities, and approve changes to the governance model.

The OpenMRS advisory committee is comprised of active representatives of the OpenMRS community, representatives of key OpenMRS partner organizations, and other appropriate domain expert advisors. The advisory committee is designed to provide guidance to the management committee as well as project leads.

Community Voice

The OpenMRS community is the foundation for our work. The community has multiple options available to participate, influence, guide and govern OpenMRS. Many of these ways are listed below. We encourage active participation in any of these venues/opportunities.

- Monitor and participate in the [Wiki](#) / [Talk](#)
- Asynchronously comment on [Wiki](#) / [Talk](#)
- Participate in the posted [calendar events](#)
- Actively participate in the operational goal meetings and/or any other meetings (published onto the [OpenMRS calendar](#))
- Present issues for discussion to the management team members or the advisory team
- Attend the [management team calls](#)
- Access the notes from the management team and send comments/ agenda items to the OpenMRS agenda coordinator, currently [Jamie Thomas](#)

Current Community Involvement and Support

The community has been in the OpenMRS operational plan. Ongoing involvement of the community will be critical to the success of this operational plan during CY 2016. The needs of OpenMRS continue to expand. As a result, the community management team has identified additional resources that are required to meet our commitment

to the global OpenMRS community. These identified resources (found at the end of this plan), including both human and/ or fiscal, reflect the goals of the operational plan that follows.

Currently, there is one paid staff, the community manager, supporting OpenMRS and paid through OpenMRS Inc.

OpenMRS CY 2016

Strategic Goals

This section provides the strategic goals developed for OpenMRS CY 2016.

- **Strategic Goal 1:** Develop and evolve the foundational technical products of our community
 - common platforms and frameworks to simplify development of any person-centric record system
 - reusable best-practice components to speed up development of health quality implementations for common scenarios
- **Strategic Goal 2 :** Develop and evolve a pre-configured electronic medical record application to be directly used in health delivery settings through a community involved process
- **Strategic Goal 3:** Actively encourage and support the development of additional OpenMRS Distributions, deriving and disseminating best practices and technologies from them
- **Strategic Goal 4:** Educate individuals, institutions, and companies on building, implementing, and maintaining OpenMRS and related health information technologies
- **Strategic Goal 5:** Help organizations successfully implement OpenMRS by cultivating and participating in an ecosystem of effective service providers
- **Strategic Goal 6:** Ensure that the operations of OpenMRS are maximized for efficiency and effectiveness for the community as well as external partners

OpenMRS Operations Plan: Approach

OpenMRS presents the OpenMRS Operations Plan for CY 2016, anticipating that work started in CY 2015 will continue to be measured and completed as appropriate through CY 2016.

To begin the process of developing the OpenMRS Operations Plan, the OpenMRS leadership worked to identify critical strategic goals for CY 2016. Each of these goals were assigned to either an individual or a team of people at the OpenMRS Leadership Camp in November 2015. The leadership team worked with community members to flesh out the domain of each strategic goal, including the development of a ‘work plan’¹. Each work plan breaks out objectives, major work projects/activities within the objective, associated milestones and timelines, and performance metrics for CY 2016. Leads also identified plans based on current resources and ideal resources. The community management team identified synergies and developed an approach that facilitates collaboration across the strategic goals. This process will continue to inform the current OpenMRS communities understanding of the projected goals. The results of this work are detailed in the following section ‘OpenMRS Portfolio : Performance Management.’

¹ A link to individual Strategic Goal CY 2016 Work Plans can be found in

OpenMRS Portfolio: Performance Management

This section provides tables outlining each of the objectives within the strategic goals. Specific milestones and/or measures to evaluate progress towards the operational plan goals are included as key indicators of OpenMRS progress and success, and will be tracked on at least a quarterly basis. The OpenMRS community management team will share the quarterly reports in the month following the end of the quarter.

In

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|---|---|--|--|
| Identify, engage and describe users of the platform Publish platform Road Map Detail how the platform road map is prioritized Create OpenMRS Platform architecture Review Board | <ul style="list-style-type: none"> Document the types of users as well as use [TBD] Identify and publish ways to monitor usage [3/16] Publish Platform Road Map Publish how users of the platform can contribute to the platform road map [4/16] Platform architecture review board [4/16] | People Burke Mamlin as Platform Lead | <ul style="list-style-type: none"> Increase number of OpenMRS Platform users by 5 percent in CY 2016 [12/16] Increase percentage of new feature tickets in the current CY platform release that went through the platform road map process [12/16] Document platform road map contributions made by at least two community members in 2016 who had not previously contributed to the platform road map. [12/16] Platform Architecture Review Board meets at least two times during CY 2016 [12/16] | <ul style="list-style-type: none"> |

Objective 1.2: The OpenMRS Platform will be released on a predictable schedule

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|--|---|---|--|
| Define role and expectations of the release management lead Develop and publish the OpenMRS release schedule | <ul style="list-style-type: none"> Identify the release management role [5/16] Release schedule published [3/16] | People Burke Mamlin as Platform Lead | <ul style="list-style-type: none"> Identify release managers at least eight weeks prior to the planned release [12/16] Platform release schedule published and release done on time [schedule 4/1/16] | <ul style="list-style-type: none"> |

Objective 1.3: The OpenMRS Platform will be scalable and reliable (stable) for production use.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
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|--|--|---|---|--|
| Define role and expectations of the continuous integration & delivery lead | <ul style="list-style-type: none"> Develop automated installation testing [9/16] Develop automated or semi-automated upgrade testing.[12/16] Define concurrency limitations [4/16] Define content limits (patients, obs, concepts, ...) [4/16] | People Burke Mamlin as Platform Lead | <ul style="list-style-type: none"> Integration testing includes automated deployment.[next test cycle] Integration testing includes automated upgrade testing.[next test cycle] Availability of automated tools for system monitoring and performance <ol style="list-style-type: none"> Down time Response time Document number of concurrent users supported given specific (average) server specifications. [5/16] Document number of rows before performance issues or bottlenecks uncovered for primary resources (patients, encounters, obs, concepts).[8/16] | <ul style="list-style-type: none"> |
|--|--|---|---|--|

Objective 1.4: The OpenMRS Platform will evolve to provide a robust framework for collaborative app development.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|---|---|---|--|
| <p>Provide a framework which, using a modular approach, allows new technology to be demonstrated.</p> <p>Enabling the growth of a library of reusable web components that demonstrate best practices and help cover 80% use cases.</p> <p>Integrate newer web and UI technologies make use of some platform services</p> | <ul style="list-style-type: none"> REST API documented and extensible FHIR module included in the Platform OWA module included in the platform Module management included in the Platform Consensus on the fundamental building blocks | People Burke Mamlin as Platform Lead | <ul style="list-style-type: none"> Develop and publish technology strategy document for showcasing/highlighting new web and UI technology use [7/16] FHIR and OWA support in the Platform.[6/16] One or more modules are added to the platform.[12/16] | <ul style="list-style-type: none"> |

Objective 1.5: The OpenMRS community will ensure consistent, productive platform development resources exists to build and refine the OpenMRS Platform

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---------------------|--------------------|-----------|------------------------------|-------------|
|---------------------|--------------------|-----------|------------------------------|-------------|

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|---|--|---|--|--|
| <p>Sufficient resources for consistent, productive platform development</p> <p>Timely review and response to issues</p> <p>Timely review of volunteer contributions</p> | <ul style="list-style-type: none"> Effectively leveraging product owners and Subject Matter Experts for the platform Improved project management for the platform Improved ability to convert design ideas into actionable tickets Responding to platform tickets in a timely manner Pull requests are addressed in a timely manner Produce and maintain technical documentation that is easy to find. | <p>People</p> <p>Burke Mamlin as Platform Lead</p> | <ul style="list-style-type: none"> Product owners and Subject Matter Experts identified, listed, and involved in at least 80% of platform design meetings [12/16] Identify full time technical project manager [6/16] Identify Business Analyst(s) [6/16] Number of unvetted Platform tickets is shrinking.[12/16] New Platform tickets get a response within 3 working days.[10/16 baseline and then improved to this rate by 12/16] Pull requests are reviewed within a decreasing amount of time [reviewed monthly with goal met 12/16] Identify technical documenter [12/16] | <ul style="list-style-type: none"> |
|---|--|---|--|--|

Objective 1.6: Understand and grow the development team

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|--|---|---|-------------|
| <p>Monitor contributions</p> <p>Improve the development process</p> <p>Grow code review capacity</p> <p>Grow active* /dev/5s</p> <p>Begin defining "lieutenants" to delegate authority.</p> | <ul style="list-style-type: none"> Develop metrics to assess contributions to GitHub Decrease time to set up development environment Decrease time to running Hello World module Improve technical documentation Increase number of active /dev/5s Increase capacity for code review | <p>People</p> <p>Burke Mamlin as Platform Lead</p> | <ul style="list-style-type: none"> Automated or semi-automated regular metrics contributing to a dashboard of community contributions in GitHub [5/16] A new, naive developer can create a running Hello World module within one hour [12/16] Number of people doing code review is growing [≥4 by 4/16, ≥7 by 8/16, ≥10 by 12/16] ≥10 active* /dev/5s [12/16] Publish updated developer's guide [8/15] External review of architecture and documentation done [10/16] One or more lieutenants named [12/16] | |

*"Active" defined as ≥12 commits/year

Strategic Goal 2

Develop and evolve a pre-configured electronic medical record application meant to be used directly in health delivery settings through a community involved process.

Overall Lead: Hamish Fraser

URL: <https://goo.gl/vnGkGN>

Objective 2.1: The OpenMRS “EMR” will serve as an appropriate starting application for underserved populations .

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|---|----------------------------------|---|-------------|
| Empower implementers to drive the prioritization of the “EMR” road map. | <ul style="list-style-type: none"> Identify and Document the OpenMRS “EMR” Functional Architecture [4/16] Define an explicit target audience for the OpenMRS “EMR” | People “EMR” App Leads | <ul style="list-style-type: none"> Published “EMR” functional architecture for minimum feature set [5/16] Published “EMR” road map [4/16] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> Expanded “EMR” functional architecture to include at least one additional clinical use case and one advanced feature [9/16] | |

Objective 2.2: The OpenMRS “EMR” will utilize and demonstrate the capabilities of the OpenMRS Platform

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|--|----------------------------------|--|-------------|
| Develop “EMR” core functions utilizing the OpenMRS Platform | <ul style="list-style-type: none"> Create concept note for end-user understanding of overall vision “EMR” architecture specifications document “EMR” contribution process document “EMR” deployment guide “EMR” test process document | People “EMR” App Leads | <ul style="list-style-type: none"> Published concept note of “EMR” vision and community accepted direction [5/16] Architecture planning document with specifications for platform use and beyond [6/16] Concept dictionary extension needs outlined and planned [9/16] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> Revision control document [6/16] Contribution process document [6/16] Test process document [9/16] Deployment guide [12/16] | |

Objective 2.3: The OpenMRS “EMR” will be released on a predictable schedule and adhere to an increasingly high standard of production readiness (technical process).

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---------------------|--------------------|-----------|------------------------------|-------------|
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|--|---|---------------------------------|---|--|
| Define role and expectations of the “EMR” release management lead** Develop and publish the OpenMRS “EMR” release schedule** Develop an implementable Quality Assurance process <i>** Coordinate with Platform Team</i> | <ul style="list-style-type: none"> Decide on formal release process in 3 months In 12 months, release the OpenMRS “EMR” on time Quality Assurance process & acceptance testing | People “EMR” App Lead | <ul style="list-style-type: none"> Documented release process [6/16] Identify release manager at least eight weeks prior to each planned release[each release] Identify Quality Assurance Lead [6/16] Published Quality Assurance Process [6/16] Perform Quality Assurance process for each release[each release] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> Published test scripts for acceptance testing for each release Engagement of 2 implementations in acceptance testing | |
|--|---|---------------------------------|---|--|

Objective 2.4: The OpenMRS community will develop and maintain a specific set of features.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|--|---------------------------------|---|-------------|
| Create an implementable requirements definition process | <ul style="list-style-type: none"> Identify development team Engage partnerships for development Release “EMR” v1 | People “EMR” App Lead | <ul style="list-style-type: none"> Engage at least 2 implementations in the requirements definition process [6/16] At least 1 partnership of developers [7/16] Identification of development team for each release cycle [12/16] >50% of roadmap prioritized and scheduled into release schedules and purposeful backlog [7/16] 2 definitive release cycles completed, including published tasks, schedule, and release [12/16] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> Engage more than two implementations in the requirements definition process [7/16] Engage 2 partnerships of developers specifically for “EMR” [12/16] At least 1 implementation using “EMR” release [12/16] | |

Strategic Goal 3

Actively encourage and support the development of additional OpenMRS Distributions, deriving and disseminating best practices and technologies from them

Overall Leads: Jan Flowers, Darius Jazayeri

URL: <https://goo.gl/5OUoJi>

Objective 3.1: The OpenMRS Community will support a process to improve access to and usage of downstream OpenMRS distributions by community members and other organizations.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|---|---|--|--|
| <p>Publicize the distribution concept, and identify existing distributions</p> <p>Make distributions more accessible to the community</p> <p>Ensure that available distributions cover important use cases</p> | <ul style="list-style-type: none"> Create definitions and categorizations of distributions Develop plan to actively promote distributions in the OpenMRS community Create space on the website to list distributions Identify and publish important use cases that are not well served by distributions and develop requirements. | <p>People</p> <p>Jan Flowers and Darius Jazayeri as Distribution Leads</p> | <ul style="list-style-type: none"> Published definition of distribution (OpenMRS criteria) and community accepted categorizations [4/16] 3 Distributions promoted in the OpenMRS community [1st in Q2, 2nd in Q3, 3rd in Q4] Identified gaps in use cases [9/16] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> Partnership with a distribution to address at least 1 missing use case [12/16] | <ul style="list-style-type: none"> Wiki page that needs update Bahmni promoted |

Objective 3.2: The OpenMRS Community will provide a distribution evaluation system for community members to judge quality and appropriateness for use in their context.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|--|---|---|--|
| <p>Develop and publish evaluation plan (including assessment and crowd-sourcing)</p> <p>Create OpenMRS distribution endorsement team and program</p> <p>Evaluate distributions using new process</p> | <ul style="list-style-type: none"> Create criteria for OpenMRS endorsement of distributions Create process for distributions to apply for OpenMRS endorsement Post positions for team to manage evaluation process and oversee evaluations Provide a way for OpenMRS Community members to rate and comment on distributions Extend Atlas to show distribution usage Reach out to distribution teams to apply for endorsement and | <p>People</p> <p>Jan Flowers and Darius Jazayeri as Distribution Leads</p> | <ul style="list-style-type: none"> Team identified and managing process [4/16] Published defined objective criteria for OpenMRS endorsement of a distribution [6/16] 1 endorsed distribution [9/16] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> 2 endorsed distributions [12/16] | <ul style="list-style-type: none"> Change to identify process (No team) Use TALK as mechanism Atlas updated |

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|--|-----------------------------------|--|--|--|
| | promote distribution in community | | | |
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Objective 3.3: The OpenMRS Community will incorporate technologies and approaches from distributions into the Platform and Reference Application, and share lessons learned and best practices.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|--|--|--|---|
| Identify interesting work in distributions Harvest good work into community-owned distributions | <ul style="list-style-type: none"> Bi-annual review of distributions to find interesting features and approaches Add identified interesting features to the Platform and Reference Application road maps | People Jan Flowers and Darius Jazayeri as Distribution Leads | <ul style="list-style-type: none"> Published method to identify best practices in distributions, modules, implementers, etc [6/16] 1 review performed to identify interesting work [12/16] 2 features from distributions added to product road maps [12/16] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> 2 features from distributions have functional and technical requirements specified [EOY] 4 features from distributions added to product road maps [EOY] 1 feature harvested from distribution and integrated into OpenMRS product/s [EOY] | <ul style="list-style-type: none"> Asked Jan to update |

Objective 3.4: The OpenMRS Community will help Distributions produce good products by guiding them to engage with community processes, leverage community knowledge, and share lessons learned and best practices.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|---|--|--|--|
| Create specific engagement pathways for endorsed distributions Develop place for sharing knowledge gained by distribution teams. | <ul style="list-style-type: none"> Create plan to ensure distribution teams are aware of standard community resources and processes Create distribution Talk channel/s Add distribution showcase specific calls to calendar Create distribution video showcase Survey of usefulness of the recordings Create distribution wiki for knowledge share Identify and reach out to distributions | People Jan Flowers and Darius Jazayeri as Distribution Leads | <ul style="list-style-type: none"> Documented process for reaching out to distributions on a regular basis to keep them engaged, updated, and involved [4/16] Documented process for on-boarding new distributions into the community [4/16] 1 new distribution with team members engaged in the community [12/16] 1 distribution lead actively participating in Advisory Committee discussions [12/16] 2 recorded video distribution showcases [1st by 6/16, 2nd by EOY] 3 Talk channels for distributions [1st by 6/16, 2nd by 9/16, 3rd by EOY] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> 2 new distribution with team members engaged in the community [EOY] 2 distribution leads actively participating in Advisory Committee discussions [EOY] 4 recorded video distribution showcases [EOY] | <ul style="list-style-type: none"> Meld with communication work Bahmni to do video Talk channel for Bahmni exists |

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| | not engaged in the community <ul style="list-style-type: none"> Add distribution team members to Advisory Committee | | | |
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Strategic Goal 4

Educate individuals, institutions, and companies on building, implementing, and maintaining OpenMRS and related health information technologies

Overall Lead: Saptarshi Purkayastha

URL: <http://goo.gl/s48Xnt>

Objective 4.1: OpenMRS will increase understanding and utilization of OpenMRS and related health information technology

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|---|---|--|-------------------------------|
| <ul style="list-style-type: none"> identify existing resources for training, including training modules identify different users that will need a unique course curriculum (devs, sysadm, design developers, implementers, etc) develop unique curriculum for these users | <ul style="list-style-type: none"> list of existing resources- 3/1/16 (include philippines, PIH, Kenya) curriculum for specific classes of users developed 5/1/16 | People Suranga Kasthuriratne, Saptarshi Purkayastha and Jordan Kellerstrass as Education Lead | <ul style="list-style-type: none"> publish resources currently available to train on OpenMRS - [4/16] develop and publish curriculum for at least three different classes of users - [6/16] <p>Saptarshi had built the online curriculum for the classes</p> <p>Consider changing to curating materials / content management process that makes sense</p> <p>Where do you go to start getting training in OpenMRS/ HIT in LMIC?</p> <p>Can we put this together in some way that it is accessible?</p> <p>We need a leader to shepherd this goal so that we can identify a person to lead this goal</p> | No lead for this at this time |

Objective 4.2: OpenMRS will improve the software development process through improved access to training and certification criteria

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---------------------|--------------------|-----------|------------------------------|-------------|
|---------------------|--------------------|-----------|------------------------------|-------------|

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|---|--|---|---|--|
| <ul style="list-style-type: none"> create a comparable system to dev ranking for content manager (levels x through x) develop a formal process to evaluate, train and retain developers-- CROSS CUTTING develop criteria for each certificate and training module for pass/fail publish specifications for training, testing and certification program | <ul style="list-style-type: none"> created comparable ranking system for content managers 2/1/16 publish a formal process to evaluate and retain developers and content managers | People Suranga Kasthurirat hne, Saptarshi Purkayastha and Jordan Kellerstrass as Education Lead | <ul style="list-style-type: none"> content manager ranking system developed, published and in use [4/16] increase retention of developers at dev level by 10% for CY 2016 [12//16]- CROSS CUTTING publish final specifications for training, testing and certification program [4/16] <p>Consider changing to curating materials for dev stages ; follow up with Burke for dev stages testing</p> | |
|---|--|---|---|--|

Objective 4.3: OpenMRS will identify and develop additional educational partners

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|---|---|--|-------------|
| <ul style="list-style-type: none"> partner with a training organizational company develop a massive open online course (MOOC) with training content evaluate educational pathway for involvement in OpenMRS by using educational partners | <ul style="list-style-type: none"> identify a training organizational partner [3/1/16] develop comprehensive training content for a MOOC 5/1/16] identify grants to support curriculum development and educational work (CROSS CUTTING) | People Suranga Kasthurirat hne, Saptarshi Purkayastha and Jordan Kellerstrass as Education Lead | <ul style="list-style-type: none"> market one MOOC course with full training content [7/16] obtain external grant funding for curriculum development [10/16] <p>Grant writing to identify and work on identification of educational partners/opportunities; add this as an educational and training initiative</p> <p>Perhaps SFSU collaboration??</p> | |

Objective 4.4: OpenMRS will ensure that community members have access to training in OpenMRS and Health Information Technology

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|---|---|--|-------------|
| <ul style="list-style-type: none"> train people to write OpenMRS modules train implementers to gain enhanced understanding of HIT and OpenMRS (CROSS CUTTING) support (Google Summer of Code (GSoC) (CROSS CUTTING) | <ul style="list-style-type: none"> develop and publish training for developers on how to write OpenMRS modules [8/1/16] ask Jan to indicate training for implementers | People Suranga Kasthuriratne, Saptarshi Purkayastha and Jordan Kellerstrass as Education Lead | <ul style="list-style-type: none"> at least five new developers participate in one training module [12//16] at least two new implementers participate in one training module [12//16] increased diversity in GSoC with at least 10% increase in female participants (CROSS CUTTING) [8/16] CROSS CUTTING FOR IMPLEMENTERS CROSS CUTTING FOR GSoC at least 20 implementers/developers will be certified in OpenMRS training [12/16] Develop a toolkit that can be used to guide and evaluate: <ol style="list-style-type: none"> the development and integration of specific usability principles process of updating a form/ etc (time/ efficiency measure) impact of software tools (as opposed to software) being deployed Interaction and experience of end user with the system [12/16] <p>Far reaching to achieve this one;continue google SoC Publish a survey about global HIT training?</p> | |

Strategic Goal 5

Help organizations successfully implement OpenMRS by cultivating and participating in an ecosystem of effective service providers

Overall Lead: Joaquin Blaya, Jan Flowers

URL: <https://goo.gl/rx8M3O>

Objective 5.1: OpenMRS will have a published well-defined strategy for service providers to engage with the community, be matched with potential implementers, and find ways to meet their needs.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
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| <p>Develop and publish the service provider concept.</p> <p>Identify existing service providers and their needs, as well as, the needs of the community for service providers.</p> <p>Make service providers more accessible to the community.</p> | <ul style="list-style-type: none"> • Create definition of service provider (3/1) • Create Talk channel for service providers (3/1) • Identify cross-collaboration with educational team to assess areas to be utilized for both programs (3/1) • List of service providers, by region, expertise/focus (3/1) • Quantify needs for a Service Provider program (6/1) • Create plan to engage service providers, incl. contributing back (7/1) • Develop concept for OpenMRS Marketplace (7/1) • Create Marketplace (10/1) | <p>People Jan Flowers and Joaquin Blaya as Service Provider Lead</p> | <ul style="list-style-type: none"> • Published definition of “service provider” (OpenMRS criteria) [4/16] • Service Provider Talk channel created and introductory discussion began [4/16] • Published plan for service provider engagement [7/16] • Publicly available service provider marketplace [12/16] <p><i>Stretch Goal</i></p> <ul style="list-style-type: none"> • Engage 3 Service Providers in Talk Channel discussions [10/16] | |
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Objective 5.2: The OpenMRS community will govern and execute a certification program for service providers to be endorsed by OpenMRS and improve matching to potential implementations.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
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| Develop the concept for a service provider certification program. | <ul style="list-style-type: none"> • Present and document 3 existing models of service provider certification in 6 months • Strategy for self-assessment model • Develop requirements and process to be a certified service provider in 9 months | <p>People Jan Flowers and Joaquin Blaya as Service Provider Lead</p> | <ul style="list-style-type: none"> • Published service provider certification program with community acceptance [10/16] • 1 service provider certified by OpenMRS [12/16] <p><i>Stretch Goals</i></p> <ul style="list-style-type: none"> • 2 service providers certified by OpenMRS [12/16] | |

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| | <ul style="list-style-type: none"> • Business model for engaging & certifying providers • Mechanism for people to express interest even if they aren't ready for certification • Rules of engagement • Encourage giving back to the community | | | |
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Objective 5.3: The OpenMRS community will facilitate advice for service providers.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
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| Create a knowledge base, guide, and toolset for service providers to use in their practice. | <ul style="list-style-type: none"> • Coordinate with educational objective to create training for service providers • Document best practices for being a good service providers and growing the organization (12 months) • Create an advisor program to connect potential advisors with service providers (24 months) • Engage social investors interested in service providers (36 months) | People Jan Flowers and Joaquin Blaya as Service Provider Lead | <ul style="list-style-type: none"> • Published guide for service provider engagement [10/16] • Published toolset for service providers [10/16-] <i>Stretch Goals</i> <ul style="list-style-type: none"> • Published strategy for facilitating advisor and service provider connections [12/16] • Mechanism for service providers to work with OpenMRS community and OpenMRS, Inc. with funding / partnership models [12/16] | |

Objective 5.4: OpenMRS will actively identify and promote accessibility to service providers that are engaged in the service provider program.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
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| Create opportunities for service providers to be promoted and accessible to implementers and other OpenMRS customers | <ul style="list-style-type: none"> Have a specific process to forward opportunities to certified service providers Develop promotional package for the concept of endorsed service providers Let other potential service providers know about OpenMRS | People Jan Flowers and Joaquin Blaya as Service Provider Lead | <ul style="list-style-type: none"> Published process to field and forward opportunities to providers [7/16] Actively marketing endorsed service providers [12/16] | |
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Strategic Goal 6

OpenMRS shall ensure that the operations of OpenMRS are maximized for efficiency and effectiveness for the community as well as external partners

Overall Lead: Terry Cullen

URL: <https://goo.gl/PJubO4>

Objective 6.1: OpenMRS shall ensure that OpenMRS performs effectively and efficiently to meet the community as well as external partners needs

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|---|---|---|---|
| <ul style="list-style-type: none"> Identify the fiscal and human resources needed to support the work plans Develop appropriate budget Develop a fundraising plan Develop and publish an operational plan | <ul style="list-style-type: none"> Comprehensive list of needed resources developed [2/16] Comprehensive list of volunteer resources needed [2/16] Reporting plan to OpenMRS INC developed [3/16] Fundraising goals established [3/16] Materials developed for fundraising [4/16] Goals developed for operational plan [2/16] | People Terry Cullen, Jan Flowers, Suranga Purkayastha and Michael Downey as Organizational Development Lead | <ul style="list-style-type: none"> Report updates to the OpenMRS BOD at least quarterly (and develop appropriate format for this reporting) [15 of the month following end of the quarter] Report updates to the community through talk [15th of the month following the end of the quarter] Obtain at least one external funder support by EOY [12/16] Meet 50% of timelines in operational plan [1/17] <p>Stretch goal</p> <ul style="list-style-type: none"> Meet 75% of timelines in operational plan [1/17] | <ul style="list-style-type: none"> Updates started |

Objective 6.2: Open MRS shall ensure that members of the community are engaged and appropriately recognized for their contributions.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
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| <ul style="list-style-type: none"> Develop and implement volunteer recognition plan Develop plan to increase diversity within the OpenMRS community | <ul style="list-style-type: none"> Re-institute a volunteer recognition program [2/16] Publish plan to improve diversity [5/16] | People Terry Cullen, Jan Flowers, Suranga Purkayastha, Michael Downey, Jordan Kellerstrass | <ul style="list-style-type: none"> At least 6 community members are recognized through newly constituted program [12/16] Dev 2 has increased diversity goals (TBD) by the newly formed diversity council [12/16] Stretch goals <ul style="list-style-type: none"> at least 10 community members are recognized through the newly constituted program [12/16] Dev 4 has increased diversity goals (TBD) by the newly formed diversity council [12/16] | |

Objective 6.3: OpenMRS shall ensure partnership opportunities are identified and implemented to extend the reach of OpenMRS into appropriate communities.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|---|---|--|--|-------------|
| <ul style="list-style-type: none"> Develop and implement appropriate partnership models and strategy to achieve partnerships develop a diversity strategy | <ul style="list-style-type: none"> publish different partnership models [3/16] define and establish the role of the OpenMRS Inc. in partnerships [6/16] | People Bill Lober, Chris Seebregts, and Jan Flowers as Leads Michael Downey | <ul style="list-style-type: none"> one partnership agreement is developed and implemented during CY 2016 [12/16] establish baseline and increased involvement of under-represented group [12/16] Stretch goals <ul style="list-style-type: none"> at least two partnership agreement are developed and implemented during CY 2016 [12/16] | |

Objective 6.4: OpenMRS shall ensure that appropriate standards and terminology (S&T) are available for utilization and integration into the OpenMRS platform as well as the reference application

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|---|---|--|---|
| <ul style="list-style-type: none"> develop a budget and operational plan that extends S&T develop and publish S&T milestones include core terminology services in | <ul style="list-style-type: none"> develop the budget [2/16] publish roadmap for S&T [6/16] | People Andy Kanter as Lead CROSS CUTTING | <ul style="list-style-type: none"> identify external funding source for essential S&T work [6/16] Identify functional requirements for S&T tooling [4/16] Develop plan and road map for S&T tools, integration into OpenMRS, content [6/16] Complete core set of S&T content for platform and reference application [12/16] Stretch goals <ul style="list-style-type: none"> identify all funding needed for essential S&T work [12/16] | <ul style="list-style-type: none"> Functional requirements done Road map done |

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| the OpenMRS platform | | | | |
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Objective 6.5: OpenMRS shall develop and track evaluation and metrics that reflect the annual goals, work plans and desired impact on health status.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|--|---|--|---|
| <ul style="list-style-type: none"> implement metric plan for the six objectives | <ul style="list-style-type: none"> develop metric plan that represents all six objectives [3/16] review metrics plan with external reviewers [4/16] present metric plan and milestones and activities to the BOD on a quarterly basis [quarterly] | People Hamish Fraser and Jan Flowers, as Lead | <ul style="list-style-type: none"> develop, endorse and implement metrics plan [4//16] publish achievements on metrics plan on quarterly basis [15th of the month following the end of the quarter] | <ul style="list-style-type: none"> Metric plan done Operational goal done |

Objective 6.6: OpenMRS will develop a communications strategy that ensures sharing and appropriate communications between internal and external partners.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
|--|---|---|--|--|
| <ul style="list-style-type: none"> develop and publish communication and marketing strategy | <ul style="list-style-type: none"> improve curation of wiki pages [6/16] establish monthly reporting of specific metrics to include downloads of OpenMRS [9/16] | People Michael Downey as Lead | <ul style="list-style-type: none"> publish annual report [3//16] an increase in. downloads of OpenMRS) by 5 percent [12/16] number of news articles number of grants/funding that depend upon OpenMRS number of training institutions with relationship to OpenMRS number of attendees at worldwide summit Number of contributors | <ul style="list-style-type: none"> Annual report done |

Objective 6.7: OpenMRS will develop a pathway to support countries, NGOs, healthcare organizations or other entities who wish to develop an EMR strategy.

| Initiative/Activity | CY 2016 Milestones | Resources | CY 2016 Performance Measures | 7/16 update |
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| <ul style="list-style-type: none"> develop a generic operational plan for OpenMRS in country communities evaluate the impact of OpenMRS on health security | <ul style="list-style-type: none"> determine what other end users need in a generic plan [4/16] evaluate health security issues that are being addressed/ could be addressed through OpenMRS (work with OpenHIE also) [4/16] work with external stakeholders to develop, review and endorse health security issue paper for global community of open source HIT products [6/16] | People Suranga Kasthurirat hne and Saptarshi Purkayasth a as Lead | <ul style="list-style-type: none"> publish an “implementers toolkit” for EMR implementation [8/16] review and revise/expand “implementers toolkit” for EMR implementation [12/16] produce a generic operational plan for OpenMRS for use by implementers [8/16] develop a white paper on the role of OpenMRS in helping address health security issues [7/16] | |
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Summary

OpenMRS community believes that the development and implementation of an OpenMRS operational plan for CY 2016 will help improve our ability to impact the delivery of health care within resource constrained communities and countries. The OpenMRS community looks forward to continuing to create a world that embodies health equity. Please help us with your ongoing engagement with OpenMRS.

Appendix

Acknowledgements

The OpenMRS operational plan is the result of a community commitment to accelerate the OpenMRS road map. The work embodied within the CY 2016 OpenMRS Operational Plan is designed to increase the impact of OpenMRS on improving health outcomes and decreasing health disparities.global. We wish to thank the following individuals and groups for their commitments to this new endeavor:

- The OpenMRS Project Leader and Community Management Team for leadership on strategic objectives
- OpenMRS Summit Attendees for session reviews
- OpenMRS Community Participants for their input and contribution to the operations plan creation
 - Specifically:
 - Jamie Thomas
 - Lorinne Banister

References

[OpenMRS Community Governance](#)

[OpenMRS Wiki](#)

[Tracking Project Plan](#)

Budget

[OMRS Operational Plan Budget](#)