# Strategic Planning for Hydra

In December 2012, the Hydra Steering Group plus a few other project members gathered at UCSD to reflect on Hydra's current state as it has largely accomplished the goals created at the founding of the project, and is entering a new phase of maturity and explosive growth. The discussions ( Hydra Community Growth Plan) led to an assessment and strategic plan to both grow the project and enhance its vibrancy and value to all participants as it grows.

**Current State Assessment for Hydra**

As of year end 2012, Hydra has doubled in size from the founding three institutions, and doubled in size again; in the next year it's going to double one more time, with a Partner base of roughly two dozen institutions. This growth creates new opportunities and new demands on the project's social and community infrastructure. For the health and success of the project, it's critical that...

* we realize the opportunity to create a full suite of "solution bundles" in the HydraSphere, fulfilling the original project vision of one repo-body and many tailored apps to fulfill the full range of DAM needs of any given institution

* the technical framework advance to enable it to incorporate the code and coding of new partners and new solution bundles; without a robust code-sharing mechanism, we risk creating many (non-interoperable) point solutions within the framework

* the community framework evolves to cope with the increased number of participants, and enhance our centripetal strategies. This includes advancing the communication and collaboration channels to incorporate contributors from 3 continents across 12 time zones; and growing the governance & administrative structure of the project to keep pace with the needs of the growing community.

If we can accomplish these three goals, the community will not only continue to grow, but it will thrive and realize the benefits of the collaboration we are all engaged in.

**Strategies**

Given this, a strategic plan for Hydra must address these elements:

1. development of a full suite of solution bundles, to satisfy individual institutions' diversity of needs as well as convince new partners & vendors to join the community. Hydra can distinguish itself as a (arguably, "the only") platform that can provide a full suite of repository-powered applications to meet the full range of solutions an institution may have. While other point solutions may rival any individual head, Hydra can offer many heads at minor marginal cost, and with full interoperability of content.

2. development of both turnkey applications, and hosted Hydra solutions, to lower the barrier to entry for institutions that have the needs but not internal IT capacity to leverage a framework on their own.

3. growth and definition of the vendor ecosystem for implementation, integration, consulting, hosting, maintenance and other services, in a way that keeps the vendors active, aligned and healthy contributors to the whole project

4. development of a training framework that scales, in order to facilitate bringing in new partners, while inculcating development and participation in the "Hydra way" (participatory, of quality, use of OSS best practices)

5. development of a documentation framework. Accurate, comprehensive and useful documentation is essential for both new and existing partners, and is a challenge to develop and maintain in a distributed environment.

6. ongoing development and reaffirmation of centripetal strategies and the "core" of the technical framework. This means an architecture that allows interoperation and sharing of code, and sufficient investment to make sure Hydra is actually a coherent and robust technical framework, not simply a pattern of RoR apps on Fedora with little in common beyond that.

7. development / reaffirmation of centripetal strategies in the community framework, to keep the project's participants bound together even as it expands in scope and scale; this includes evolving the partner / administrative / steering framework, defining relationships with the solution bundle sub-communities; defining relationships with vendors/service providers; and keeping developers & contributors in 3 continents / timezones communicating, in alignment, and developing complementary solutions

8. development of a marketing and community expansion plan. To date, much of the outreach has been through word of mouth; for Hydra to reach its full potential (and keep pace with similar solutions), concerted outreach to new communities and via all channels will help ensure a critical mass of Hydra adopters, an infusion of new energy, and a potential market for vendors. As part of this, Hydra will not only work to expand the user base, but also firm up the commitments and contributions from Partners, who are the project's core contributors and main engine of progress.

**Action Plan**

**Strategy 1: Develop A Full Suite of Solution Bundles**

- By OR13, Hydra will have catalyzed work beginning on a DSpace-equivalent Hydra head.
- By OR14, a DSpace-equivalent Hydra head will be available to the community.
- By end of 2013, Blacklight / Hydra users will have a robust & polished exhibits tool in Atrium (Ohmeka-equivalent)
- By end of 2013, Blacklight / Hydra users will have a demonstrated, replicable approach to presenting Finding Aids and archival collections (XTF-equivalent)
- By end of 2013, there will be viable heads / solution bundles for time-based media (Avalon), images (DIL), and administration (Argo).

**Strategy 2: Develop Turnkey / Hosted Solutions**

- By end of 2013, Hydra will have fostered the beginnings of development of both hosted and turnkey Hydra solutions
- By OR14, there will be a Hydra turnkey application available to the community via at least one provider.
- By OR14, there will be a Hydra hosted solution available to the community via at least one provider.

**Strategy 3: Grow the Vendor Ecosystem & Define the Vendor Community Structure**

- By end of 2013, Hydra will have X (x=3?) vendors in the ecosystem, performing consulting, training, integration, custom development, SAAS...
- By end of 2013, Hydra will have a defined structure with vendors that is symbiotic with the overall community.

**Strategy 4: Training Framework**

- By end of 2013, Hydra will have a training framework that includes a standard, shared Hydra curriculum, a method for offering onsite trainings at new adopters looking to launch quickly, and a way to deliver training multiple times a year at multiple locations (internationally).

**Strategy 5: Documentation Framework**

- By end of 2013, Hydra will have a documentation framework that will define targeted audiences, information needs, initial development / infill of any gaps, and mechanisms (including resourcing strategies) to maintain the project's documentation base.

**Strategy 6: Technical Framework**

- By end of 2013, Hydra will have demonstrated robust code-sharing and reuse across heads and sites, and a technical core that facilitates this.
- By end of 2013, Hydra will have co-developed and demonstrated / tested the viability of initial code in Fedora 4.x
- By end of 2013, Hydra will have investigated and framed its needs to provide maintenance support and continuity for deployed Hydra software (heads, gems), and identified approaches for meeting these support needs.
- By OR14, Hydra will have tested and adopted clear, proven methods for addressing needs for stable, supported software.

**Strategy 7: Community Framework**

- By LDCX^4, we will have CLA's on file from all contributors
- By OR13, Hydra will have an updated and more polished articulation of its community principles, values, methods and benefits--the recipe that has defined the "hydra way" to date, and much of the project's success.
- By OR13, Hydra will have more clearly defined the balance of roles between the Steering and Partners groups, promoting engagement, transparency, effectiveness and efficiency in community governance and administration.
- At OR13, Hydra will have a Hydra UG meeting as part of the official conference track.
- By end of 2013, Hydra will have established a framework for fostering & working with Solution Bundle communities.
- By end of 2013, Hydra will have established a framework for fostering & structuring its relationship to vendors; this possibly includes registered service providers, endorsed events and products, etc.
- By end of 2013, Hydra will have defined an approach for coordinating development and support activities of partners across Europe, North America and Australasia
- <span style="color:red">(New 2013-06-27)</span> By the end of 2013 Hydra will have established a mechanism for raising awareness at conferences etc where Hydra is not explicitly represented - eg publicity materials in delegate packs).

**Strategy 8: Community Expansion**
*(added after discussions at Sept 2013 Hydra Partners meeting at State College, Pennsylvania)*

- By OR14, assemble a kit of Hydra marketing collateral (glossies, tangibles) into a managed library for Partners' ready use.
- By OR14, create a marketing and outreach plan to represent Hydra at relevant conferences (e.g., SPARC)
- By OR14, create a plan for producing Hydra webinars and screencasts representing the project and various heads.
- By OR14, launch a Twitter account for the Hydra project
- By OR14, clarify the distinctions between Users and Partners, and the benefits and expectations of each.
- By OR14, create a registry of Hydra Users (for tracking and reporting on adoption, and managing project notifications).
- By Apr 30, 2014, establish a semi-annual communication to promote publishing articles about Hydra in journals (e or otherwise), in institution repositories (if appropriate) and raising awareness by populating the Hydra website with the information or a link to the digital version.

Progress against the 2013 Strategic Action Plan