

# Developing Guidelines for Community Participation

CS&S Event Fund Workshop  
July 20, 2022

# Participation Guidelines (in addition to the ones you reviewed from CS&S!)

- Acknowledge that we're still in a pandemic, and people are experiencing it differently.
- Recognize we all bring our own experience and expertise.
- Avoid jargon.
- Talk 1/nth of the time.
- Mute your mic when not speaking.
- Be mindful that not everyone speaks English as a first language.
- Let's make the most of our time together!

# Agenda Overview

WEDNESDAY, JULY 20

- :08 - :22 Framing for discussion
- :22 - :50 Breakout groups
- :50 - :00 Reflections

# Values and Principles

# Values

Values provide purpose and direction.

When starting a new project and/or organization, collectively creating these can help set the pace for a team to work towards goals, objectives, and even the long-term “different future” embedded in our work.

Quick values exercises can start with a simple collaborative exercise that asks people to consider what the cultural markers of your work and organization/project are, and then hone in to craft simple and concise statements (they can even be one word!).

# Principles

Principles are like tiny algorithms that help you and your team make decisions that support your values.

Typically they are created by the leadership of project and/or organization, with input by team members, because principles need to be embodied by leaders.

When creating principles, questions to ask include:

- Why am I looking at x thing?
- What is a principle that takes care of a zombie routine?
- What decisions do I make daily that move the organization forward and what can others do?

# Codes of Conduct (and other helpful guidelines for ensuring a great event)

# Code of conduct

Guidelines and rules that outline community norms and practices. Codes of Conduct generally outline the responsibilities of community members and provide consequences of violation.

Created by project/organization/event/community leadership with space for community review.

- Became popular in corporations and government in the 1980's
- Linked to ethic codes in professional associations and fields. Parallels such as:
  - ◆ respect for persons (autonomy, privacy, informed consent)
  - ◆ balancing of risk to individuals with benefit to society
  - ◆ careful selection of participants
  - ◆ independent review of research proposals
  - ◆ self-regulating communities of professionals
  - ◆ funding dependent on adherence to ethical standards

(Metcalf, [2014](#))

# Code of Conduct: Statement

The Citizen Science Association is dedicated to providing a safe, friendly, productive, and welcoming environment for all participants. All who take part in community events, regardless of gender, gender identity and expression, age, sexual orientation, physical abilities and intellectual abilities, physical appearance, body size, race, ethnicity, or religion or beliefs, deserve an inclusive and harassment-free environment. We hold that a diversity of views, expertise, opinions, backgrounds, and experiences of all attendees will make our community stronger, wiser, and more productive.

To this end, we expect all participants to adhere to principles of integrity and respectful treatment of others and their ideas. Please refer to Community Guidelines and the event Terms and Conditions for further support for positive interactions.

The following behaviors will not be tolerated:

- Hate speech, harassment, discrimination, abusive behavior, insults, intimidation, or threats in any form or medium
- Sexually explicit language or material (exceptions only for research-relevant biological processes)
- Violations of privacy or intellectual property
- Disregard for rules and instructions of session facilitators or moderators
- Illegal or criminal behavior

Anyone requested to stop unacceptable behavior is expected to comply immediately. Procedures and options for reporting violations will be prominently available throughout the event.

CSA reserves the right to take any action deemed necessary and appropriate in response to any incident of unacceptable behavior. This may include immediate removal from the event or event site without warning or refund. CSA reserves the right to prohibit attendance at any future event, online or in person.

Why

What we expect

What is not allowed

What will happen

Organization rights

# Code of Conduct: Longer Format

## Examples of in-person community behavior

Do	Don't
Ask permission to take pictures of and post about others on social media ( <i>see Media Consent, below</i> ).	Do not upload photos, tag or mention others online without their consent.
Speak your own narrative, from your own unique experiences and culture.	Do not imitate the cultural expressions of groups you are not a member of, or dismiss people's experiences as illegitimate or merely personal.
Use accessible language to talk about your area of expertise. If others in the group seem confused, slow down; stop and ask for input.	Do not present information in a way / language that no one else in the room can understand, with no attempt to include others in the discussion. Accessible language is part of the GOSH manifesto.
Give everyone a chance to talk, only interrupting if absolutely necessary – for example, for Code of Conduct violations or time updates.	Do not repeatedly disrupt a discussion.
Stop, listen and ask for clarification if someone perceives your behavior or presentation as violating the Code of Conduct.	Do not ignore or argue others' request to stop potentially harmful behavior, even if it was an accident or you don't mean it as it is being interpreted.

Provides examples

## How To Report A Problem

**In Person — Safety Officer or GOSH Organizers:** If you are at a GOSH event with a designated Safety Officer, feel free to approach them or an organizer.

**Via email — GOSH Organizers:** If you experience or witness something, you can also email the organizers at [organizers@openhardware.science](mailto:organizers@openhardware.science).

**Reporting should never be done via social media.**

Clear instructions for reporting a problem

## Consequences

- Anyone requested to stop behavior that violates the Code of Conduct is expected to comply immediately, even if they disagree with the request.
- The GOSH organizers may take any action deemed necessary and appropriate, including immediate removal from the meeting without warning.
- The organizers reserve the right to prohibit attendance at any future meeting.

Details on consequences for violating the Code

Agreement that you will follow the Code (but also suggest this is done before event)

**By attending GOSH events and posting in our online forum, you are agreeing to this code of conduct.**

Cite your sources!

This Code of Conduct was created collaboratively and drew from other CoCs, including those by Public Lab, International Congress of Marine Conservation 2016, and TransHack.

Gathering for Open  
Science Hardware

# Using the Code of Conduct

Some pointers from GOSH on how to introduce a Code of Conduct at your event:

- The Code of Conduct is taken seriously. This is not just a “because we have to have it” document. **Serious Code violations will result in consequences.**
- Identify your safety officer (who can also be the one who does the Code intro) and/or Code of Conduct committee. Clearly identify how you can get in contact with the appropriate people. Having a **clear way to identify that person(s) throughout the event** is helpful.
- **We are from a lot of different cultural backgrounds.** There are some things in the Code that might not make sense and you should strive to create an environment where this can be discussed. Identify the safety officer and/or Conduct Committee as people who individuals can privately speak with to understand things that might be confusing.
- **Go through the Code of Conduct section by section.** Provide examples of potential violations and examples of what people can expect in the case of a potential violation, but also provide examples of positive behavior that counters your negative examples.

# Key considerations for Codes of Conduct

- Know your attendees and be aware of cultural differences
- Identify the purpose of your Code (i.e. virtual event vs. in person event, covering both online and in person spaces, long term implementation vs. use only during events)
- Provide your Code ahead of time so attendees aren't seeing it for the first time at the event
- Have a way to enforce
- Give examples of expectations and what will not be tolerated
- Give people a clear way to privately make reports
- Cite the codes that you build from (in true open fashion!), it's not only the right thing to do, but provides a lineage to Codes.
- Always keep improving!

# Tools of facilitation

## Simple guidelines for virtual spaces:

- Talk 1/nth of the time.
- Mute your mic when not speaking.
- Raise your hand
- Leave links and comments in the pad

## In-person spaces:

- Consider providing facilitation tips and training for everyone
- Demonstrate what facilitation looks like in practice
- More tips for in-person facilitation training during events: [GOSH framework for running community events](#)

# Accessibility statements, media releases, & more

Consider what additional guidelines you'd like to have for 1) your internal team, 2) your audience, 3) both. For instance:

- Accessibility statement and/or plan
- Media release form
- Pronouns descriptor

Questions so far?

# Workshop Scenarios: Breakout groups

Scenario 1: You are a small team that is running a new center at a University. You are the first group pulling together a community around [insert brilliant idea here] and are going to host a 100 person “community building” virtual event.

Scenario 2: Alongside several other colleagues, you’ve been tasked with creating a new open science engagement program inside the association you’ve been working for. Over the next year the goal is to run monthly virtual events, culminating in an in-person event at the end of the year. The association is over 100 years old and has multiple layers of leadership above you.

Scenario 3: You pitched an event idea, and it was funded! While you’ve known your team for a couple of years this is the first concrete event that you’ll be doing together. You don’t have an organization, but are considering creating one if you feel the momentum is right. Your first event is going to bring together people from 15 different countries over a four day period.

Scenario 4: While you all work for different entities – some corporate, some government, some NGO – you’re collaborating on a series of three virtual events about equity in space of data science. You anticipate a group of approximately 20 to show up for each event. Each event will be a half day with multiple deep-dive breakout rooms and resulting from the event will be a public report-out.

Scenario 5: You’ve recently joined a start-up that is thinking about new funding models for scientists. Your organization is getting a set amount of start-up capital from three foundations and you have a year to discover additional (and new) sources of funding. Your first step is to bring together a community to help you develop a plan. But oops! The founders tell you they are still working on the mission, vision and values of the organization and need to complete these prior to planning the in-person, retreat-style, 60 person event.

# Your Prompts

What is the problem you are trying to solve? And how will this happen?

Spend time discussing:

1. Your audience. Who are they? What are their priorities? Why are they attending the event? Are there any key identifiers?
2. What you'll do. What types of guidelines will you need to create for your event?
3. What needs to happen first? Talk about sequence of activities.
4. Resources. Who needs to be involved? What skills do they have? What non-human resources are necessary?
5. Create a lightweight map of the process.

# Reflections

- What types of community collaboration guidelines did you identify as necessary in your scenario?
- What did you surface?
- What was interesting about the process? What was surprising?

# Thank you!

Shannon Dosemagen

[shannon@openenvironmentaldata.org](mailto:shannon@openenvironmentaldata.org)