📌 Welcome!
We will start at 11:32 PT.
Please introduce yourself and
your project in the chat!

Audience building for open source projects

Julia Lowndes, Openscapes
@juliesquid

Chan Zuckerberg Initiative
Essential Open Source Software for Science Meeting Workshop, December 8, 2020

slides: openscapes.org/media

Workshop plan

First 40 mins:
- Presentation
  - Advice and starting resources
  - Examples with Openscapes
- 3x short, silent activities interspersed

Last 15 mins:
- Discussion
  - Share questions and experiences
  - How can we approach this together?
- Please (re)write your questions in the chat at that time & I'll moderate

End at 12:25 PT

* I'll be watching the chat during the activities and discussion

* Please upgrade to the latest version of Zoom (Zoom > Check for Updates)

COMMUNICATION

Define your audiences to create meaningful messaging and web presence

COMMUNITY BUILDING

*Welcome folks to participate and contribute, leveraging existing channels*

SUSTAINABILITY

Build resilience through strategic planning, governance, and onboarding team members

OVERARCHING THEMES

openness · inclusion · maintenance

PROCESS:
· iterative
· reinforcing
· overlapping

Hi, I'm a marine ecologist and open source project founder

(Environmental) Science

Data Science

Training, mentoring, ♥ community empowerment

Open Source
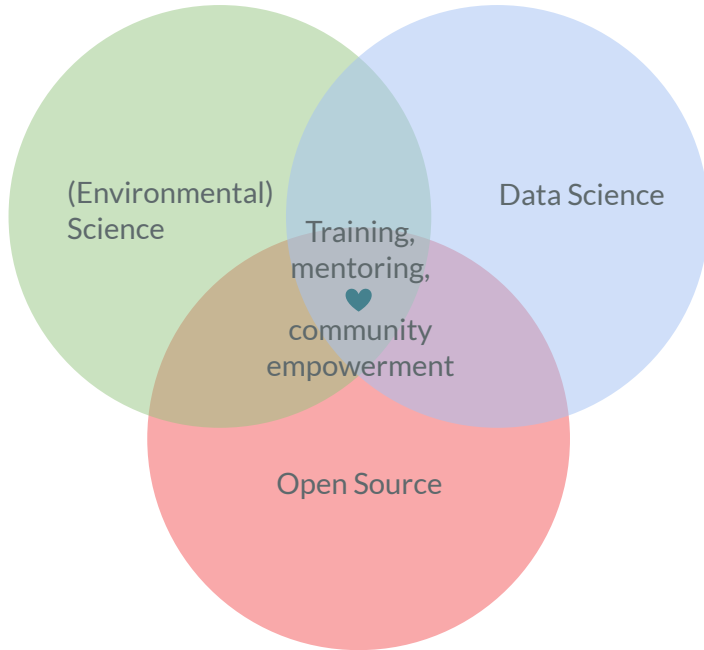
Julia "Julie" Stewart Lowndes, PhD, jules32.github.io 👋

Senior Fellow, National Center for Ecological Analysis & Synthesis, University of California Santa Barbara

NCEAS **UCSB**
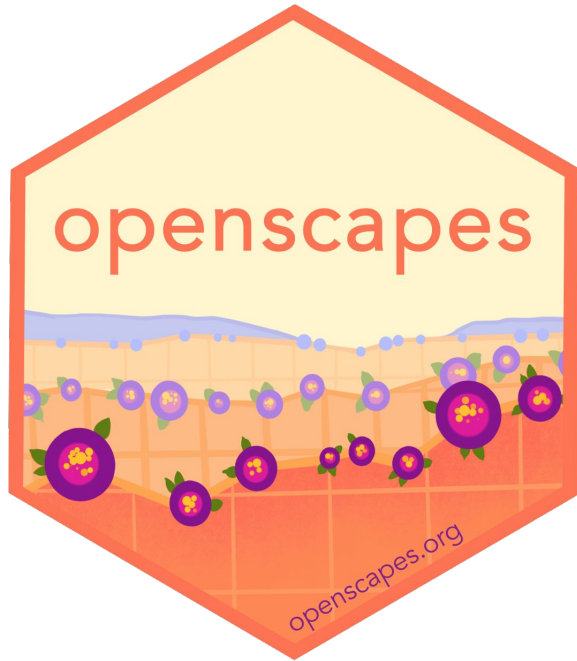
Open Community Member, entryway through R

rOpenSci   RStudio   R Ladies   THE CARPENTRIES #rstats

Mozilla Fellow 2018-2019, founded Openscapes

moz://a

Openscapes helps researchers reimagine data analysis and develop open data science leadership skills

Openscapes Champions is a remote mentorship program that cultivates collaborative and inclusive research teams
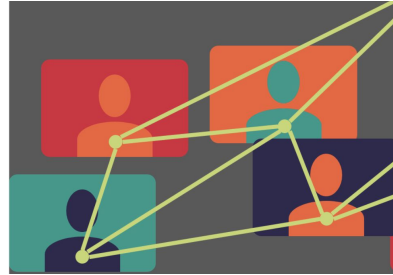
Main resources that frame my thinking
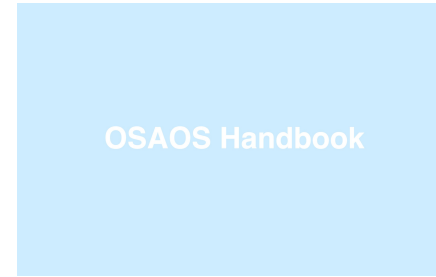

Working on distributed teams CC BY-SA 3.0 Mozilla

Mozilla Open Leaders

Open Leadership Training Series
Open Leadership Framework
Work Open, Lead Open (#WOLO)
Movement building from home

Scientific Gateways Community Institute

sciencegateways.org
Focus Weeks
Case studies

OSAOS Handbook

Open Source Alliance for Open Scholarship

Handbook

COMMUNICATION
Define your audiences to create meaningful messaging and web presence

COMMUNITY BUILDING
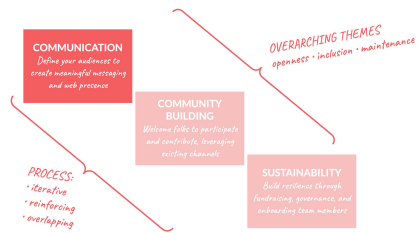Welcome folks to participate and contribute, leveraging existing channels

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Audience

Defining your audiences and understanding their needs helps you communicate in ways that resonate.

Define your primary & secondary audiences

Primary audience: users (most likely) ✶
- What *kind* of researchers?

Secondary audiences: allies
- What *kind of* decision-makers, funders?

Understand your audiences
- Who are they?
- What are their values, motivations, challenges?
- How does their participation help you?
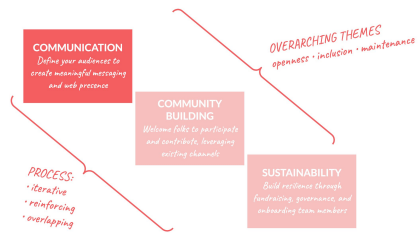- How do you prioritize them?

✶ Two-sided market (eBird, Etsy)

How are your audiences already connected?

Mapping the research software ecosystem Karthik Ram & James Howison's Workshop: Wednesday

References & Resources
- Audience First – SciFund
- Focus Weeks – Scientific Gateways Community Institute (SGCI)
- eBird Case Study – Ithaca Case Studies in Sustainability (download)

Messaging

Crafting a clear message that describes the value of your work in inclusive language helps you reach your audiences.

Craft your value proposition

What value do you provide? Why is it important? If your project disappeared, who would care?

Reframe your message for different audiences *
- Think about motivations, entryways
- Iterate on a as-needed basis

Use inclusive language, as if all your audiences are all in the same room together

* Messaging will mature as your program and understanding of audience needs evolve
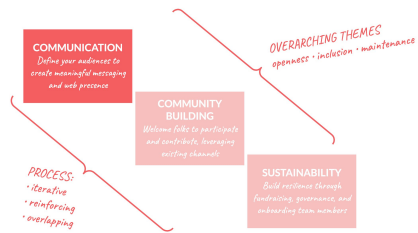
Value proposition

[MY PROJECT]............

will help [WHO?]........

do [WHAT?]........

by [HOW?]

References & Resources
- Focus Weeks – Scientific Gateways Community Institute (SGCI)
- Message Box – COMPASS

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Web presence

Using different web platforms helps you engage your audiences early.

Present your project openly online

"Can you send a link?" - be able to say yes.

Use light-weight, existing platforms, and cross-link – website doesn't need to come first
- Docs and Issues on GitHub
- Guest blogs
- Forums

Plan your website – start simple & purposefully
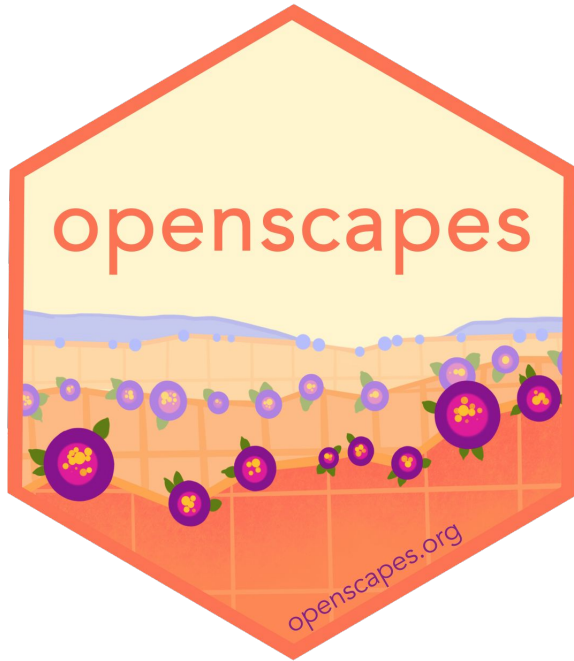- Think incrementally, and about maintenance

Share updates as you progress. Create teaching materials too –

Creating open computational curricula
Kari Jordan's Workshop: Wednesday

References & Resources
- Open Leadership Training Series – Mozilla
- Open Leadership Framework - Mozilla
- Work Open, Lead Open (#WOLO) – Abby Cabunoc Mayes

COMMUNICATION

Example of defining the primary audience, messaging, and open web presence

OPENSCAPES

Primary audience (so far): environmental scientists
- who don't approach data analysis openly/reproducibly/collaboratively
- who want to help upskill their teams

Two-sided market: mentees and mentors

Secondary audiences – ally communities:
- Open source, open science, open data
- Data science, software development
- Training, mentoring, coaching, community
- Team science, collaborative science
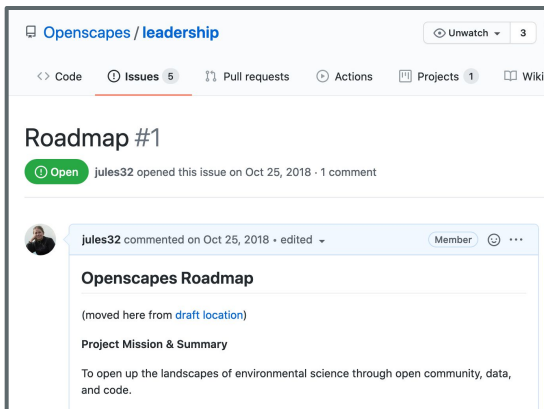- …

Openscapes value proposition (rework)

Openscapes.............

helps researchers........

reimagine data analysis and develop open data science leadership skills........

through a remote mentorship program that cultivates collaborative and inclusive research teams

**Fall 2018:** GitHub Org, Issues & READMEs, blogging on Medium

Winter 2019+: Website, Champions Lesson Series
- Created with R+GitHub (blogdown & bookdown)
- Messaged for primary audience, serves secondary too
- As we mature, updated communications
  - Blog posts are regular enough
  - Added Media page
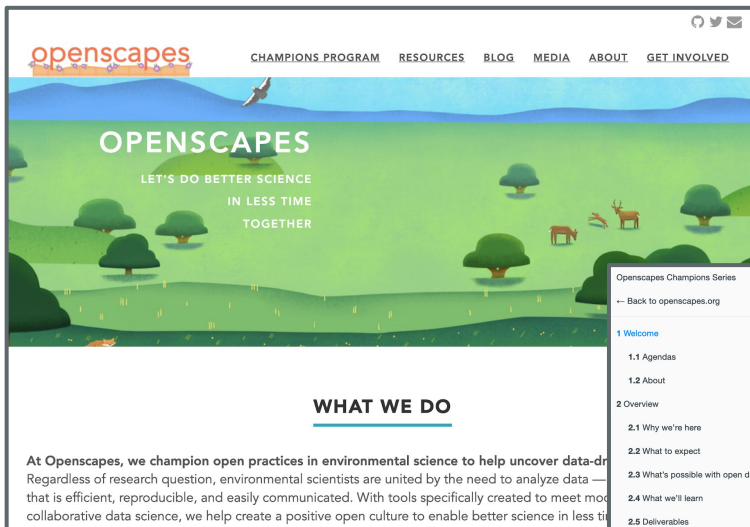
web: openscapes.org,
series: openscapes.org/series

github: @openscapes, Medium: @openscapes
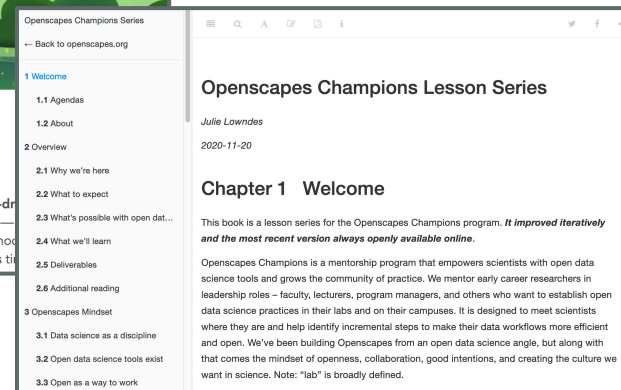
Activity (30 sec)
Write in the chat

What is a potential next step for you in terms of communication (audience, messaging, web)?

COMMUNICATION
Define your audiences to create meaningful messaging and web presence

COMMUNITY BUILDING
Welcome folks to participate and contribute, leveraging existing channels

OVERARCHING THEMES
openness · inclusion · maintenance

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SUSTAINABILITY
Build resilience through strategic planning, governance, and onboarding team members

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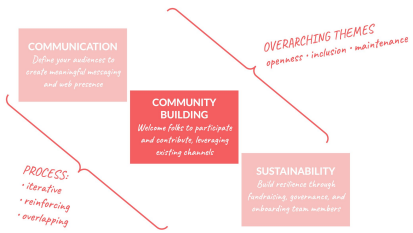
Power of Welcome

Creating a welcoming community helps diverse folks feel included, valued, and safe. This helps enable enduring participation and contribution

Build Welcome into norms into your project

Be deliberate & purposeful
- Language you choose
- Behavior you model
- The actions you take

Code of Conduct
- Values forward
- Public & highly visible
- Reporting channels
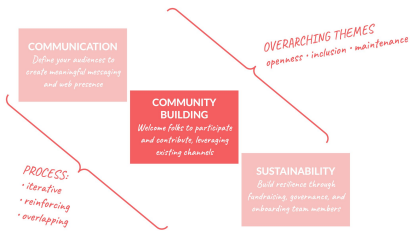
References & Resources
- Inclusion & Governance checklist – Mozilla
- Value of Welcome – Stef Butland
- rOpenSci's CoC, Mozilla's CPG

Working open as a way to shift power
5 Open source practices that can shift power:

Gifting	Soliciting Ideas	Learning Through Use	Creating Together	Networking Common Interests
Giving	Listening		Collaborating	

Biased by default: Exploring Discrimination in Research Code
Abby Cabunoc Mayes' Keynote at #BCC2020

Contributing

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Having clear channels for folks to contribute helps create buy-in and champions to support your project

Create clear entryways to engagement

Mountain of engagement

A sustainable community has:
- Entryways for newcomers
- Ways to level up

Leadership

Networked
Participation

Sustained
Participation

Participation

First Contact

Discovery
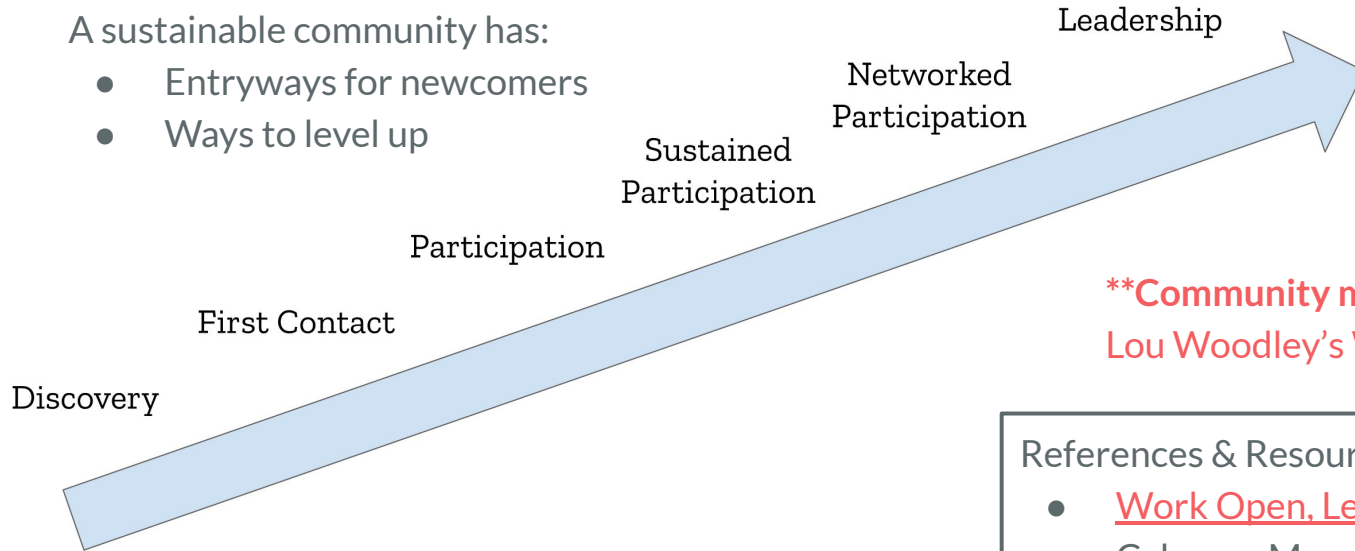
Clear value exchange. How can you create champions and support your community at each level?

Community management
Lou Woodley's Workshop: Thursday

References & Resources
- Work Open, Lead Open (#WOLO) – Abby Cabunoc Mayes
- Biased by default – Abby Cabunoc Mayes
- Open Leadership Framework - Mozilla
- Architecture of Participation – Tim O'Reilly

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Channels

Leveraging existing communication channels helps your community stay in contact synchronously and asynchronously
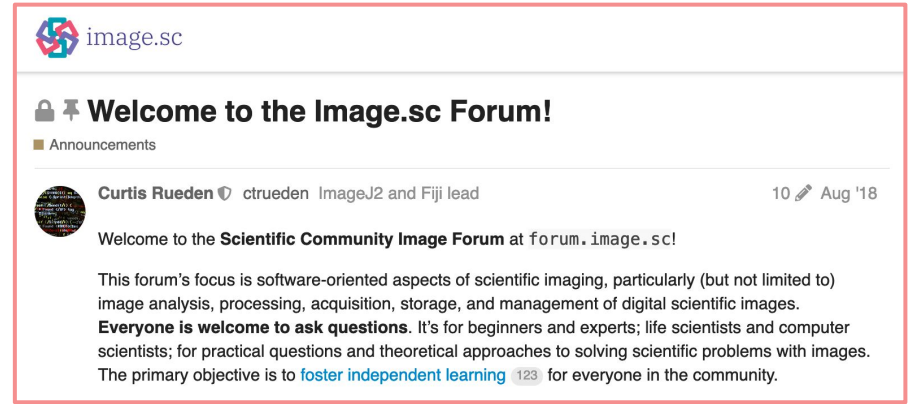
Help your community connect with you and each other

Updates and events
- Async: e-Newsletters, blog posts, videos
- Sync: Community calls, workshops, conferences

Convening your community – where is your audience? Leverage existing channels
- Social media – Twitter, Facebook, Instagram, Mastodon
- Slack, Gitter
- Community forums

image.sc

🔒 📌 Welcome to the Image.sc Forum!
🟫 Announcements

Curtis Rueden 🛡 ctrueden ImageJ2 and Fiji lead   10 ✏ Aug '18

Welcome to the **Scientific Community Image Forum** at `forum.image.sc`!

This forum's focus is software-oriented aspects of scientific imaging, particularly (but not limited to) image analysis, processing, acquisition, storage, and management of digital scientific images. **Everyone is welcome to ask questions**. It's for beginners and experts; life scientists and computer scientists; for practical questions and theoretical approaches to solving scientific problems with images. The primary objective is to foster independent learning 123 for everyone in the community.

References & Resources
- Using Twitter – SciFund Challenge
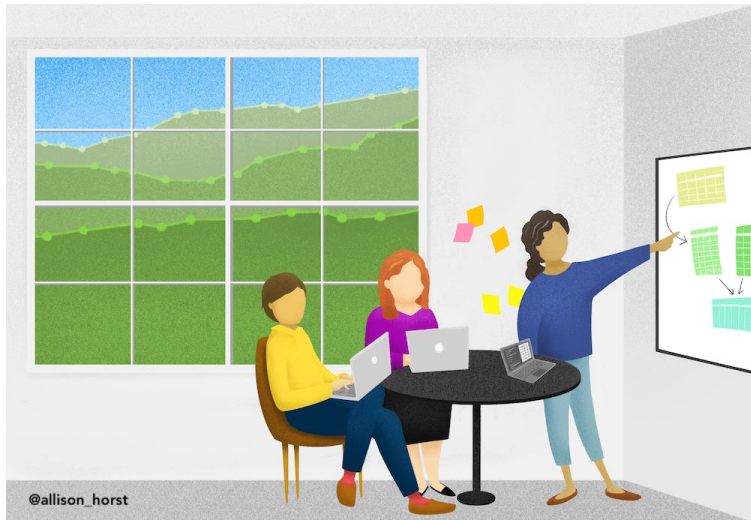- Slack Quickstart Guide – CSCCE
- ImageSC Forum
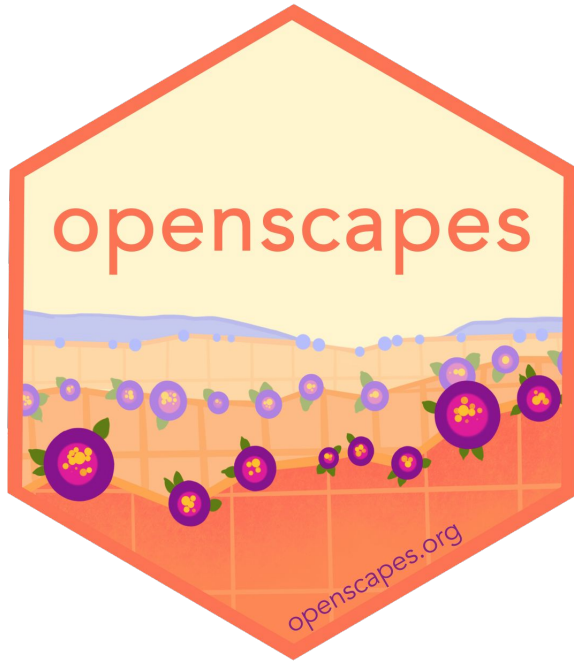
COMMUNITY ENGAGEMENT

Example of first focusing on welcome, and still building contributing plan and channels

- **Welcome**: art and storytelling
  - Entryways to talking about data
  - Vulnerabilities in reframing analysis as collaborative
- **Channels**: (pinned) GitHub repos, Twitter, department seminars, conference talks, journal articles
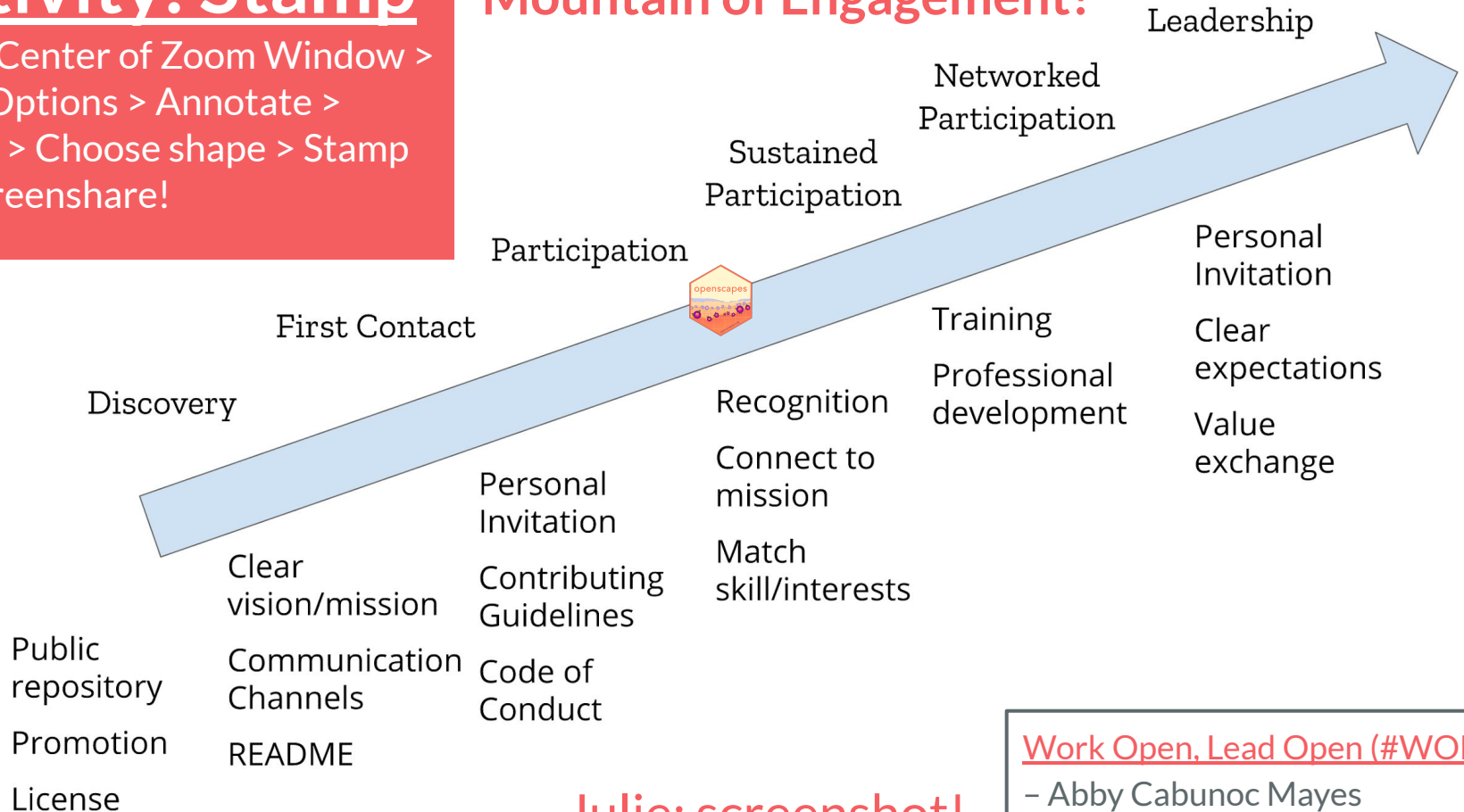- **Mountain of Engagement**: challenging for me. 2021 focus on "sustained participation"

@allison_horst

github: @openscapes, Twitter: @openscapes; openscapes.org/media

Activity: Stamp

Top & Center of Zoom Window >
View Options > Annotate >
Stamp > Choose shape > Stamp
the screenshare!

Where is your project in the Mountain of Engagement?

Leadership

Networked
Participation

Sustained
Participation

Participation

First Contact

Discovery

Training

Professional
development

Personal
Invitation

Clear
expectations

Value
exchange

Recognition

Connect to
mission

Match
skill/interests

Personal
Invitation

Contributing
Guidelines

Code of
Conduct

Clear
vision/mission

Communication
Channels

README

Public
repository

Promotion

License

Julie: screenshot!

Work Open, Lead Open (#WOLO)
– Abby Cabunoc Mayes

COMMUNICATION

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PROCESS:
· *iterative*
· *reinforcing*
· *overlapping*

SUSTAINABILITY

Build resilience through strategic planning, governance, and onboarding team members

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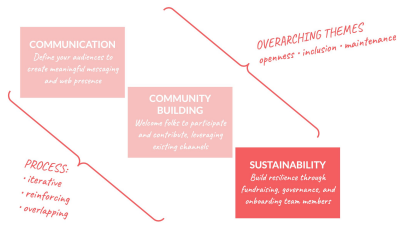
Strategic planning

Approaching strategic planning through the lens of community helps you build meaningful connections while you learn.

Focus your strategy on learning and people

Read about & talk to groups that work in your space

- Learn about the funding landscape
- Learn about business models & approaching multiple revenue streams
- Build relationships, allies

A strategic plan is also about:

- Mission statements
- Goal setting, identifying smaller pieces of your project
- Budgeting and personnel
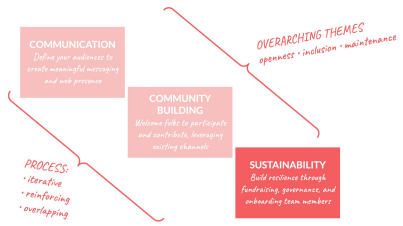- Timelines

Don't approach this alone! Learn with others

The Joint Roadmap for Open Science Tools (JROST) Conference Dec 14-16 2020

Register: investinopen.org/community/jrost-2020-conference

References & Resources
- OSAOS Handbook – Bentley et al 2018
- Focus Weeks – Scientific Gateways Community Institute (SGCI)

Governance

Clearly defining the decision-making process early on helps as the project grows.

Governance is important internally and externally

Sharing vision and responsibility
- Key to growing your project
- The "bus factor"
- Existing models to learn from (OSAOS)
- When? Depends, but too early > too late

Governance is also about:
- Legal considerations
- Financial management
- Data handling, privacy

Questions to ask yourself as you consider when to create a governance plan (OSAOS):
- What is the current form of governance?
- Who are the current decision-makers?
- What's working? What's not working?

References & Resources
- Inclusion & Governance checklist – Mozilla
- Modeling threats to your open project – Danielle Robinson 2019, Code for Science and Society
- OSAOS Handbook – Bentley et al 2018
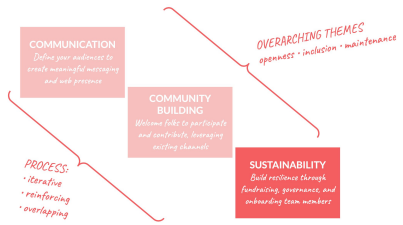
Onboarding

Planning ahead and documenting internal processes helps streamline knowledge transfer when others join your internal team.

Think of onboarding for Future You & Us

Onboarding (Wikipedia):

"the mechanism through which new employees acquire the necessary knowledge, skills, and behaviors in order to become effective organizational members and insiders"

What will make your life easier when
- You need to return to something after weeks/months/years
- You need to help someone else take responsibility?

Build documentation for how to run your project
- Internal READMEs, HowTos
- Organization and permissions

"Bus factor" critical here too

References & Resources
- Onboarding, Software peer review – rOpenSci
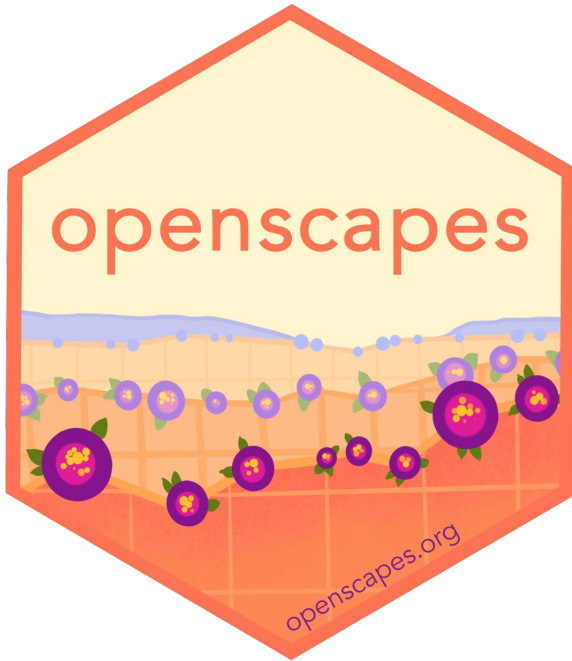
SUSTAINABILITY

Example of focusing on onboarding, and ongoing efforts for strategic planning and governance

Onboarding: Focused on onboarding myself, and also towards growth
- Google Doc, GitHub repos & issues
- Modeled from Mozilla Open Leaders

Strategic Planning:
- Learn from development & budgeting folks, funders
- I've made mistakes (30-slide pitch deck 😱)
- Emerging business model: Combo of fee-for-service, grant funding, sponsorships, partnerships
- Still in process of securing funds beyond initial seed funding

Governance: Will be focusing on this in 2021 as my team grows!

mozilla GORDON AND BETTY MOORE FOUNDATION

👤 Openscapes_Cohort1 [Leads_Cohort1]	
👤 Openscapes_CohortCalls [Public]	
👤 Openscapes_CohortCalls_Archive [Cohort1]	
👤 Openscapes_Workshop [NOAA NEFSC]	
📄 ChampionshipPlans 👥	
📄 EmailLog-Cohort1 👥	

Indicate permissions [in brackets]

Draft/archive emails in a single doc for re-use

Activity
Write in the chat

How could you use help with sustainability (strategic planning, governance, and onboarding)?

Discussion
Please write in the chat

📌 **Please write /hand**
If you'd like to unmute to share verbally

End time: 12:25 PT

What questions do you have?

What experiences/resources do you want to share?

How can we approach this together?

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📌 **Thank you so much!**

I'm looking forward to connecting further during the conference and beyond!

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@juliesquid