



Open Source Inclusion Basic Checklist

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Anna e só (@contraexemplo),
they/them, ela/dela



Hello! I'm Anna, and I currently live in Brazil. I'm an inclusion and diversity consultant, and a researcher passionate about community relations. I joined Mozilla Open Leaders last year as a mentee for a project I work on, Tainacan, which is developed by the Federal University of Goiás in a partnership with the Brazilian government and the Brazilian Institute of Museums. I also work on Outreachy, a three-month internship program in open-source projects for underrepresented groups in tech. My pronouns are "they/them" in English and "ela/dela" in Portuguese.

POP

Purpose: This checklist provides open source projects with basics for evaluating the inclusive design in key areas. This checklist is intended to provide insight, and education.

Outcome: Use the checklist to apply best basic inclusion practices in your project.

Process: Short presentation & discussion.

Optional assignment: apply this checklist to your project.

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This checklist is one of the few steps of a long journey of self-reflection as a person and as a leader. Even as a person that belongs to multiple minorities (I'm a disabled and queer non-binary person), I'm in a constant process of deconstructing thoughts, opinions and behaviours that are the result of a mindset that heavily oppresses those who don't conform to the norm. Be kind to yourself in this journey while keeping in mind there's always room for improvements.

Going back a bit to what Mark Surman describes as the foundation of open leadership...

1. Sharing decision-making, giving the community the power to shape the project and point it to a better direction.
2. Distribute content and code, as a way to encourage the community to maximize the “usefulness” of the project.
3. Inviting participation, welcoming people from different perspectives and making sure there are resources to help those interested in participate to join easily.

I want to go back a bit to mention again what Mark Surman describes as the foundation of open leadership. Those three points marked my life as an open-source contributor. After a year working exclusively with free software, I soon realized that having an “open code” doesn’t necessarily mean you “work open”.

“Collaborative efforts take a lot more than just making the code available to anyone, being primarily based on human interactions and emotional labor.”

This quote comes from an essay I wrote on the subject in September of last year. If you are interested in reading it, here's the link: <https://anna.flourishing.stream/2018/09/04/open-code-is-not-working-open/>

Collaborative efforts take a lot more than just making the code available to anyone, being primarily based on human interactions and emotional labor. The third point, welcoming a diversity of ideas, is fundamental to achieve points one and two.

That's why embracing diversity and being inclusive is so important.

Diversity

Recognising our differences

Inclusion

Embracing diversity & creating an environment where all kinds of people can succeed



As people in a more privileged position, it's our responsibility to use our visibility and influence to empower those consistently, historically and systemically ignored. To be welcoming without being condescending. To include without being patronizing. We must foster an environment that offers not only equal opportunities to success, but also accommodates everyone's needs.

I don't know about English, but in Portuguese "equality" (igualdade) and "equity" (equidade) have different connotations. Equality means treating everyone equally, while equity proposes a bit more of work towards understanding that

not everyone starts at the same place in current times, and we should strive to repair those unjust conditions.

Governance

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Governance is such a powerful word, yet so misunderstood. An inclusive community should have an established process of governing — how decisions are made, which things the project consider a priority, its main means of communication. But it all falls through without measures to ensure the health and safety of your community.

Code of Conduct

Helps to create a safe community for everyone (regardless of age, gender, ethnicity, socioeconomic status, gender-identity or any other dimension of diversity)

A Code of Conduct is not enough

You need to make sure to have a transparent enforcement procedure described in it and follow it accordingly.



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A Code of Conduct is the most known method to achieve that. However, a CoC by itself isn't enough. There's actually a lot of work behind it, from writing it in a way that explicitly protects all community members to enforcing it.

CoC basic checklist

- ❑ We have a Code of Conduct
- ❑ Our Code of Conduct is visible from our main page
- ❑ The following points are clear and transparent:
 - ❑ What are acceptable and unacceptable behaviours
 - ❑ In which environments your Code of Conduct applies
 - ❑ How to report unacceptable behaviours
 - ❑ Expected timeframe to contact the reporter
 - ❑ Who deals with the reports (ideally multiple individuals)
 - ❑ Contact details for each individual
- ❑ There is a clear follow-up process (filed reports)

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So, you want a CoC. Now what? Your CoC must be visible on your main pages. It also should have the following points clear: acceptable and unacceptable behaviours; in which environments your Code of Conduct applies - chatrooms, forums, meetups, conferences, private messages; how to report unacceptable behaviours - email forms, etc. And you should tell them explicitly who will have access to that report; expected timeframe to contact the reporter - A day, two days? What if it's urgent? This is a good practice. It helps with establishing trust; "contact details for each individual" - this is important because you have to keep in mind

there's a possibility of someone involved with the Code of Conduct enforcement team to be involved in an incident. The reporter should have the possibility of contacting another person in this case; follow-up process. Who will contact the reporter? And the person who was reported? What will happen then?

Need some inspiration?

- [Geek Feminism Code of Conduct](#)
- [Mozilla Participation Guidelines](#)
- [The Carpentries Code of Conduct](#)
- [STEM Gamchangers code of. Conduct](#)
- [Outreachy Code of Conduct](#)
- [OtterTech's Evolving Code of Conduct Language](#)
- [Safety First PDX's training materials on Code of Conduct Implementation and Enforcement](#)
- [PyCon 2018 CoC Transparency Report](#)

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We have here a list of CoCs and other resources. I advise you to be very careful about the language you use on your Code of Conduct. As the excellent blog post by Sage Sharp on OtterTech's blog says, certain terminology that is still extensively used on Code of Conducts (such as "victim" and "harasser") is insufficient to describe a great number of situations.

Safety First PDX's materials may help you hold some exercises on your community on Code of Conduct Enforcement if you aren't located in the US nor can afford a specialized workshop. Some of them will mention a couple of

situations so you can train standard procedures to the most common incidents.

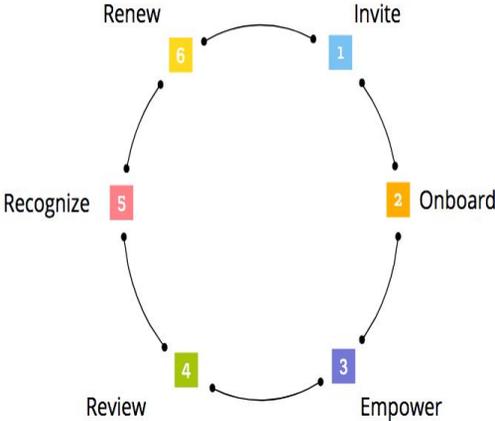
Transparency reports are a great way to build trust. Your ultimate goal shouldn't be not receiving any reports but rather ensuring you community that incidents are taken seriously.

Leadership

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What is our responsibility as leaders?

Inclusive Leadership Cycle



Inclusive leadership is a cycle...

Leadership is central to project and community culture, and thus require intentional design, and accountability for the empowerment of others.

- ❑ Our project leadership is designed with cycles of feedback and review to avoid gatekeeping and to encourage inclusive behavior.
- ❑ Responsibilities of leadership are clearly documented.
- ❑ We recognize leadership equally, including non-technical leadership.
- ❑ We recognize 'empowering others' as a core attribute of leadership, and discourage self promotion.
- ❑ We reach out to people we know would be great leaders, including underrepresented people who might not recognize their potential.

Check out the [CHAOSS criteria for inclusive leadership](#)

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As Mark says, we should invite participation. We should also take responsibility in providing to newcomers comprehensive and accessible processes and documentation to help them get on board. We should empower them, and include in our projects cycles of feedback and review while keeping an open mind to recognize our mistakes. We should recognize their efforts, appreciate them, credit them. We should also set our projects free. Act as tomorrow is your last day at that project and make everything possible to make its existence not dependent on you. Delegate responsibilities, and document your work properly. Reach out to people you believe

would be great leaders, “including underrepresented people who might not recognize their potential.”

Project and Community Design

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About project and community design itself...

Communication and language

- ❑ We have a welcoming and open channel for community participation.
- ❑ We strive to avoid [jargon and other non-inclusive language](#) that can alienate, and make underrepresented people feel excluded.
- ❑ We strive to encourage and recognizes the quietest voices, and not just those with the most confidence, and volume.
- ❑ We recognize that the the [primary language of the project may not be the first language of all contributors](#), and where possible provide transcripts of meetings and other key project correspondence are easily found.
- ❑ We have provided a way for everyone to share their pronouns, and respect those in our conversations and communication.

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You need to include people from all kinds of backgrounds and technical levels. Never assume someone is in the same technical level as you – avoid jargon, non-inclusive language and if they have questions, follow through appropriately. Discourage the use of expressions such as “obviously”, “everybody knows”, “it’s pretty clear that...”.

Documentation

- ❑ We have taken one or more steps to improve the [accessibility](#) of our documentation/website?
- ❑ We encourage and support localization of our documentation.

Tasks

- ❑ We provide non-technical tasks for first-time contributors to learn about, and participate in our project.
- ❑ To encourage community leadership, we have good 'first-pr' label, encouraging people to support maintainer review of PRs.

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Is your documentation accessible? Is it easy to find? Easy to edit and collaborate with? What about its “translatability”? Do you offer any kind of localization support?

Have a good doc on how to start contributing, and what kind of tasks they can claim to start working on your project. On your repository, have “good first issue” or “newcomers welcome” labels. Try to be very descriptive on every issue, but even more on the ones you use those labels to help on onboarding.

Thank you!



Thank you so much for listening me, and take care!