Open Source Governance by Example

Apereo Webinar

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START YOUR TIMER 🚨

You have 60 minutes total, including Q&A
welcome everyone!
^ thanks for being here!
Today we're going to be learning about governance with respect to free and open source projects
But first there's one quick piece of housekeeping to do
Every project is different, having a unique community with similarly unique constraints and needs. Therefore the content in this talk is intentionally high-level. I've saved a lot of time at the end to address your specific questions. Drop those into the chat and I'll get to them at the end, OK? I won't even see them until that time. Wilma's gonna help keep track of them, though. Thanks, Wilma!

Now, let's get started with a fundamental question:
What is Governance?

you may already have some idea about the answer to this
or you may not
gonna define it so we're all on the same page
And we're going to start with some formal definitions.
I'm also going to read the contents of these and other slides for our visually impaired audience members.
"Governance encompasses the system by which an organisation is controlled and operates, and the mechanisms by which it, and its people, are held to account. Ethics, risk management, compliance and administration are all elements of governance."

"Governance is the process of making and enforcing decisions within an organization or society. It encompasses decision-making, rule-setting, and enforcement mechanisms to guide the functioning of an organization or society."

— https://en.wikipedia.org/wiki/Governance
"the act or process of governing or overseeing the control and direction of something"

— https://www.merriam-webster.com/dictionary/governance

Each of these definitions are, of course, accurate. But they're hardly catchy.

Here's how I prefer to define "governance", especially in the context of free and open source projects:
Governance is infrastructure for humans. It's those bits that exists to allow humans to function and interoperate smoothly. It's the "how and why we do things here". That's a broad definition, and that's intentional.
Examples of Human Infrastructure

— Conflict management and decision making methods
— Codes of ethics and conduct
— Contribution procedures
— Project roadmaps
— Intellectual property policies

The infrastructure required varies depending upon the group of humans involved.

Here we see a few very high level examples of some examples of human infrastructure: READ LIST

These are all things that set up expectations for, again, "how and why we do things here."
FOSS is Made of People.

Because free and open source software is by, for, and of people, not code.
The code is important, but without the people? Ya got nuthin'.
And those people collaborate better when they share an understanding of the rules of engagement within the community.
We need that shared understanding, as well as the expectations that come with it
This makes governance a vital part of any FOSS project.

Without this shared understanding, you have no community, no collaboration, none of what makes free and open source software truly special.
Despite how critical governance is to the functioning of FOSS projects and communities, there are still a number of problems that are worryingly common.
Problem:
Not Thinking About Governance at All

Not the least of which is that governance rarely bubbles into the awareness of many FOSS maintainers.

Over the past several decades of free and open source software, we have unfortunately created a culture that prioritises code over much else.

A secondary concern may be licensing, which is similarly important but undeserving of the level of fixation it has.

For many maintainers, the human infrastructure never enters their mind.
Problem: Thinking Governance Isn't Needed

...but if it does, it's dismissed as something that doesn't require additional attention.

"it's obvious how things work"

"people can learn how it's done on their own, like I did"

The bootstrapping, they-should-suffer-as-I-did approach is all too common

It's an anti-pattern that we find all over FOSS projects and communities.
If you don't give people directions, they'll make their own path.

(and you may not like where they go)

The problem is, governance is absolutely needed to help people move in the same direction. If you don't provide guidance to people, they'll make up their own because they need to get stuff done.

It's not their fault that the project is working with unexpressed expectations. And, a little secret about those "we don't need no stinkin' governance" projects...
Whether they know (or admit) it or not, all projects have some sort of governance.

Even single-person projects have "how I do things here" processes and policies
Think about your own projects. They don't even have to be open source.
You know that data must go in this location and be in that format.
You know that you must not share certain data.
You know that you must not publish without review.
These are elements of the governance of your project. The governance is there...
...it's just not acknowledged
a lot of projects deny the governance that exists already, claiming policies & procedures just bring overhead
Then, not having documented how things work, new community members and contributors make a best guess at how to do things
And established community members get mad at them.
Problem:
Governance is Hard.

Fundamentally though, most maintainers are good people who want to do the right thing.
They just don't know how.
This governance stuff is HARD.
It's hard to choose, it's hard to document, it's hard to maintain.
This is human infrastructure stuff
I don't know whether you've noticed, but we humans are squishy, difficult things
Therefore defining anything related to getting humans to interoperate well is similarly squishy and difficult.
That's OK. There are a lot of valuable and worthwhile things that are difficult.
As with so many worthwhile things, the best way to start is to dive in. That said, it can be helpful to have some guardrails so you don't end up veering all over the road. Where can you start with governance for your project?
Most Important Questions to Answer and Document

— What's the purpose or mission of the project?
— Who leads the project?
— How is the leadership chosen?
— What is the code of conduct?
— How is it enforced?

Start by answering these five questions.
Unless it's a 1-person project, don't answer these alone. Involve the community.
It's a pretty short list, but these are complex questions.
We're talking "meaning of life" type stuff as far as the project is concerned.
Take the time to discuss the answers, then document them in the project itself.
Make sure people can find the information.
These questions are where you can start, but they're not the only topics you can consider.
Afterward, you can move on to documenting the answers to questions like...
Other Things to Consider

— How do people contribute?
— What's the contribution approval process?
— How would you prefer people report bugs, request features, or ask questions?
— How can someone join the core team?
— Are there meetings? Who runs them? How? Where?
— What's the deal with the project's finances?
— How does the project recognise non-code contributions?

These are only a few ideas, and they may not even apply to your project.

It's also far from an exhaustive list, since FOSS governance includes...

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Remember, governance is the "how and why we do things here" for the project. How you interpret that is up to you, but I choose to interpret it broadly. For better or worse, this can lead to a LOT of things you may wish to document. That's good! The more transparent a project is with its governance the better! However, I do recommend you start by...
Consider how you approach the project. What are the tasks that you perform while working on it?
How would you prefer those tasks be done?
Write those unwritten rules.
While you're doing that, you'll undoubtedly come up with ideas for other things you'd like to define better. Add them to a list (open an issue!) to get to them later.
Look at What You Have

Is it What You'd Like It to Be?

Revise and Fill in the Blanks

Now: iterate.
Know that you'll never really feel like this process is "done", and that's OK.
And often, you'll look at a question or a document and wonder whether there's anything that can help you with these gnarly questions.
Of course, as you've already guessed, the answer is YES, there is!
You can do thing's the open source way!

Oops, not that one...
That's right, you can learn from and build upon the work of those who came before you. You can learn a lot by looking at the governance documents of other projects. And many of those documents have licenses that will allow you to copy and reuse them (with appropriate attribution).

Previously, this would require doing a LOT of manual web searches. But there's a better way.
That way is called the FOSS Governance Collection.

This is a project that provides exactly what it says on the tin:

A collection of governance documents from FOSS projects all over the world.

It increases the discoverability of FOSS Governance documents from all over the FOSS ecosystem

And makes your life easier.
These documents are:
catalogued
^ archived
^ and full-text searchable

All of this is thanks to the project using the superb Zotero
free software project.

Zotero, as you may know, usually acts as a citation and
research tool, but it works perfectly here.

And, because it's a Zotero Group Library, you can even use
it with the Zotero desktop application if you're so inclined.
Live demo?

Yes, live demo!

👉

Shall we have a look?

OK, let's see whether this works OK...
So that's the quick tour. The collection is constantly growing as I add and catalog more documents. The most helpful thing people can do to contribute to the project is to open issues with links to documents that I can add. You'll need a Gitlab account. All the contribution instructions are on this website.
I'm VM Brasseur, corporate strategist and open source leader.
I'm also the author of these two books.
You can find these slides right now here on Internet Archive.
You can find me here at mastodon, and here's an email where you can reach me.
And you can my books at this URL.
Thanks to Patrick, Wilma, and the team for having me.
And thanks to you for being here.
Now, does anyone have any questions but not comments disguised as questions?