## Summary

OpenRefine will engage Bocoup to define and facilitate a community-driven process for establishing OpenRefine's Mission, Vision, and Values.

### OpenRefine will provide:

- A point of contact for the Bocoup team to partner with and learn from about the OpenRefine community
- Timely feedback on draft materials

### Goals

- Conduct research on the OpenRefine community and its needs
- Engage in community input-gathering to inform OpenRefine's Mission, Vision, and Values
- Deliver a set of community-vetted Mission, Vision, and Values statements
- Deliver high-level recommendations on next steps for implementation

### Workstreams

For this project, the specific engagement model would be customized based on the learnings from our initial input gathering and research. Given our current knowledge of the project, a sample timeline might look as follows:

<table>
<thead>
<tr>
<th>Week</th>
<th>Proposed Activity</th>
</tr>
</thead>
</table>
| Week 1-2 | - Review all existing materials/input, including the summaries from the user interviews conducted last year  
            - Interview OpenRefine's project manager about the OpenRefine community to better understand how best to identify the right community members/groups and how to engage them |
| Week 3  | - Identify gaps in the existing research  
            - Identify engagement mechanism for supplementary research |
<table>
<thead>
<tr>
<th>Weeks 4-7</th>
<th>• Conduct supplementary research, pending research needs (possible pathways include targeted interviews with a sample of the OpenRefine community, facilitated focus group, or a written survey with targeted questions)</th>
</tr>
</thead>
</table>
| Week 8-9  | • Synthesize research findings  
• Discuss learnings with OpenRefine's project manager  
• Identify engagement mechanism for input on draft materials  
• Draft Vision, Mission and Values |
| Weeks 10-13 | • Share draft Vision, Mission, and Values  
• Conduct 2-3 rounds of facilitated input gathering with a representative sample of the OpenRefine community (pending engagement mechanism identified in Weeks 8-9)  
  - Would account for different dimensions relevant to OpenRefine's community, potentially including:  
  ```markdown  
  - Role of stakeholder  
  - Level of engagement  
  - Communication style  
  - Demographics  
  ```  
  - Size of the population depends on the number of considerations/variables. From early conversations/indications, potentially 10-20 individuals  
  - Can potentially be supplemented with wider survey of entire community, pending expected efficacy of broadening reach  
• Update materials based on feedback received |
| Week 14 | • Deliver final materials, including community-driven Vision, Mission, and Values Statements, and high-level next steps for socializing them  
• Conduct handoff meeting, including final feedback gathering on the experience |

**Timeline.** This project will kick off in April 2024. Completion of the full SoW is scheduled to occur in July 2024. This includes any previously scheduled time off, mutually approved by both OpenRefine and Bocoup. In the event of unscheduled unavailability such as sick time, both parties will discuss an alternative schedule and align, together.