OpenRefine Mission, Vision, Values 2024: Bocoup Materials

OpenRefine Vision, Mission, Values

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Overview

In April 2024, Bocoup and OpenRefine launched a community-focused process for clarifying OpenRefine’s Vision, Mission, and Values. The goals of the engagement were to:

● 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

This document includes both the final Mission, Vision, and Values statements and Bocoup’s recommendations on next steps for implementation. The appendices provide additional context on the output of the research.

The engagement consisted of two phases of research. In phase I, between May and June 2024, Bocoup reviewed OpenRefine’s materials and interviewed 17 targeted community members on their experiences with and vision for OpenRefine. The interviewees varied in professional and demographic background, engagement style, and relationship to OpenRefine, and were carefully selected to represent a diverse range of perspectives on the OpenRefine community. The themes that emerged from those interviews informed the first draft of these materials.

In phase II, between June and July 2024, Bocoup conducted two rounds of feedback on the draft materials. First, Bocoup conducted a hybrid workshop at OpenRefine’s first BarCamp, where 23 opt-in participants shared their reactions to, and suggestions for improving, the draft materials. Bocoup updated the materials accordingly. Next, Bocoup collected asynchronous feedback on the updated draft materials via Discourse and social media. This final round of feedback was intentionally untargeted in order to reach community members who prefer written communication or might have been previously missed. The asynchronous feedback informed the final set of deliverables presented below.
Vision

A more informed world where working with data is easy and engaging.

Mission

Empowering everyone to meaningfully engage with data by providing an accessible open source tool and nurturing a diverse, supportive community.

Values

We recognize that building and supporting a tool that meets the important vision and mission of OpenRefine necessitates a values-driven community. The values below refer to the community’s core principles and ethics. These values directly map onto the principles embedded into the tool itself and are reflected in how OpenRefine, the tool, is conceptualized, built, maintained, taught, and used.

➔ Respectful of Diverse Backgrounds & Expertise
➔ Approachable
➔ Transparent & Open
➔ Curious
➔ Community-driven
Values Descriptions

We recognize that building and supporting a tool that meets the important vision and mission of OpenRefine necessitates a values-driven community. The values below refer to the community’s core principles and ethics. These values directly map onto the principles embedded into the tool itself and are reflected in how OpenRefine, the tool, is conceptualized, built, maintained, taught, and used.

Respectful of Diverse Backgrounds & Expertise: We celebrate that people come to the OpenRefine tool and community from varying backgrounds, identities, technical abilities, geographies, privileges, industries, linguistic backgrounds, and more. We honor the diverse experiences and expertise of our users and contributors and aim to develop features and training that encourage and nourish diverse engagement with the tool, prioritizing accessibility and usability to broaden reach and impact.

Approachable: We ensure that OpenRefine is inviting and supportive of all participants by providing various on-ramps to engagement with the tool and community, including but not limited to clear documentation, thoughtful mentorship and training, and by prioritizing ease-of-use and participation across backgrounds and skill-levels. We expect everyone to engage with kindness, warmth, patience, and an unwavering commitment to mutual support.

Transparent & Open: We create pathways for and encourage clear communication and knowledge-sharing, ranging from regularly-updated documentation to consistent public participation in community forums. We believe that transparency is essential to a collaborative community where everyone is informed and feels empowered to engage. The tool mirrors this commitment to transparency through prioritizing privacy of all users and their data.

Curious: We believe in the importance of a learning mindset, where everyone leads with questions and engages with humility. We recognize that we have a lot to learn from one another, and seek opportunities to foster our mutual growth. This includes being thoughtful in how we give and receive feedback, consistently examining our own biases, and providing proactive support to new learners in our community. For the tool itself, we operate with humility and listen to end-users to prioritize their needs and plan for features and iterations that optimize their use of the tool.

Community-driven: We seek to facilitate a meaningful sense of community among users and contributors, and to prioritize the perspectives of community members in key decisions. We believe that our users and contributors define OpenRefine, and should collaboratively drive our work forward – not as isolated individuals but as members of a diverse, supportive, and vibrant community. This is reflected in open communication about the future of the community and tool, a sense of agency among community members, and in democratic decision-making around strategic and technical priorities.
# Recommendations for Next Steps

Developing a shared Vision, Mission, and Values is a critical first step in creating a cohesive culture with clear goals, priorities, and expectations. In order to best leverage these materials, they must be infused into both OpenRefine’s strategic planning and the fabric of the day-to-day work. Below, we present our recommendations for next steps in socializing and beginning to put OpenRefine’s Vision, Mission, and Values into practice in order to:

1. Attract and onboard new contributors to the OpenRefine community
2. Ensure efficient internal communication
3. Position OpenRefine effectively with partners, providing them with a clear understanding of the project’s direction
4. Evaluate and integrate new ideas in alignment with OpenRefine’s roadmap

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<th>Goal</th>
<th>Recommendations</th>
<th>Timing Notes</th>
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| Socialize and consistently evaluate/improve upon shared Vision, Mission, and Values (VMV) | Incorporate into upcoming (and recurring) user surveys with questions that assess respondee’s:  
  - Comfort and familiarity with VMV  
  - Perspective on the alignment between VMV and OpenRefine’s aspirations  
  - Suggestions for improvement to VMV | Once annually |
<p>| | Add VMV to OpenRefine website under “About OpenRefine” | Within 1-3 months |
| | Add Vision and Mission to OpenRefine funder proposal templates |  |
| | Add Values to Code of Conduct with explicit reference to expected behaviors |  |
| | Add VMV to draft OpenRefine playbook |  |
| | Facilitate routine reviews of VMV, leveraging user survey responses, Discourse, and focus groups to assess continued alignment between the materials and OpenRefine’s aspirations | Twice annually |
| Incorporate VMV into OpenRefine’s daily work | Through brainstorm or workshop session, develop a set of roadmap evaluation criteria that explicitly use VMV as the central reference point. | Within 1-3 months; refresh at least once annually |
| | Through brainstorm or workshop session, develop a conflict charter and communication norms that explicitly use VMV and Code of Conduct as the central reference point. As needed, update Code of Conduct to | Within 3-6 months; refresh at least |</p>
<table>
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<tr>
<th>reflect conflict charter and communication norms. Charter and norms should include:</th>
<th>once annually</th>
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<tr>
<td>● Preferred modes of communication between community members, staff, and other stakeholders</td>
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<tr>
<td>● Expectations around how disagreement is communicated and received</td>
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<td>● Procedures for addressing conflict</td>
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<td>● Perspective on accountability</td>
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Audit processes within OpenRefine’s playbook for alignment with VMV and identify areas for more tangible alignment
Appendix A: Interview Synthesis

Overview

Between May-June 2024, Bocoup interviewed 17 targeted community members on their experiences with, and vision for, OpenRefine. This document provides a synthesis of the themes from these interviews. It was a critical input in the development of the draft Vision, Mission, and Values statements.

Current State: Strengths and Areas for Improvement

Strengths

Good intentions among the staff and community were a recurring theme in the interviews. From OpenRefine’s focus on openness and transparency, to community members’ willingness to help if anyone has a question, several interviewees emphasized the desire to operate thoughtfully and to continually improve. Specific examples of this desire included OpenRefine’s Project Manager following up with the community after surveys, and OpenRefine’s decision to pursue this current project to clarify its Vision, Mission, and Values.

Another key theme was widespread appreciation for the tool. Interviewees commented on individuals from a range of backgrounds trying to solve a range of problems using OpenRefine, the sheer volume of advocates for the tool, and the relatively large number of contributors. A few interviewees recalled feeling motivated by the experience of meeting people who are excited about the tool, or showing someone the tool for the first time and seeing their reaction.

A couple of interviewees also commented on the breadth of options/avenues for getting involved with the community, though one noted that retaining community members has proven more challenging.

Areas for Improvement

The most commonly raised concern referred to the inaccessibility of the community, especially to “non-experts.” A few interviewees referred to the prospect of engaging as intimidating, non-welcoming to new users, and/or challenging for non-technical individuals. Others attributed the inaccessibility to the tone of discussion, with a couple referencing past miscommunication and fear of criticism and pushback.

Additionally, several interviewees expressed concerns about how decisions are made at OpenRefine. Specifically, interviewees noted decision making feeling overly centralized in a small group of vocal community members, many users not having influence over the priorities, and a lack of clarity in the expectations and modes of engagement.

Finally, capacity to participate was repeatedly mentioned as a barrier to participation. In some cases, this was their individual bandwidth, but in others, this referred to the challenges of keeping
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up with the tool and community, given the size and the futility of trying to catch up on everything that has been done.

Future State: Community and Societal Impact

Vision for Community Impact

Numerous interviewees mentioned their desire for diversity within the community across several dimensions, including industries, skills, demographics, and geography. Technical skills and sectors/industries were the dimensions explicitly listed most often. Some interviewees focused on the diversity of users, while others on diversity of contributors.

Interviewees also envision a community that’s accessible and welcoming to all, with non-technical individuals feeling comfortable to contribute, easy on-ramps to joining the community, and ample opportunities to ask questions and seek support without fear of judgment. Interviewees used words like open, helpful, and warm to describe their ideal community, with multiple avenues to safely engage.

Several interviews also mentioned wanting it to feel like a proper community, rather than a collection of users. There was a theme around wanting community members to feel like they’re part of a project where developers are listening to them about what to prioritize, and where there is clarity on how to interact and exchange ideas.

A final theme emerged around wanting clarity within the community on how and why to engage. This might include measurable goals and outcomes for community initiatives, clear pathways to contribution, shared understandings of decision rights and consensus, and clarity on how the tool can be used to benefit their work.

There were also several one-off suggestions that did not fit cleanly into any themes. These included the desire for more contributors overall, an opportunity for people to share their experiences and successes rather than just questions, and greater political engagement among community members.

Vision for Societal Impact

The major themes regarding the societal impact of OpenRefine were greater reach for the tool, easier and more efficient use, and increased use for social good.

In terms of overall reach, interviewees envision the tool being used more widely, and allowing for greater overall information sharing. Some interviewees expressed a desire to reach a broader community of users, especially among those who interact with data, so that more people can benefit from the existence of OpenRefine.
Relatedly, others emphasized the importance of making OpenRefine easier and faster to use so that people can do more with data more easily and share information more freely. This theme referred less to general reach, and more to lowering the barriers to engagement with the tool.

Finally, interviewees envision the tool being more intentionally and proactively used for public good. Interviewees mentioned wanting the tool to be used to promote a more just world through data, empower people to engage with data with more curiosity, and connect industries through data in the pursuit of social justice.

**Out of Scope Considerations**

There were a few themes that emerged that did not fit cleanly within the scope of this engagement, but merited mention. These included:

- **Improvements to the tool/tool management:**
  - Additional Product Management support
  - Additional design direction
  - Updated backend
  - Updated user interface

- **Greater clarity on the direction of the tool and community:**
  - More of a roadmap/runway for the future
  - Clarity on OpenRefine’s vision for how much of the community would be paid vs. volunteer
  - Clarity on whether OpenRefine requires more funds to maintain additional contributors or is satisfied with the volume of paid contributors

- **Increased pathways for engagement**
  - Additional modes of communication with the OpenRefine staff
  - Internal working groups
  - Different tiers of formal, structured involvement
Appendix B: BarCamp Feedback Synthesis

Overview

In June 2024, Bocoup presented and workshopped a draft version of the Vision, Mission, and Values at BarCamp. BarCamp participants provided input as both a full group and in small group brainstorms. Following BarCamp, the Bocoup team provided the following description of the changes.

Vision

Revised Vision: A more informed world where working with data is easy and engaging.
Original Vision: Working with data is easy, accessible, and fun.

Changes:
- Added “A more informed world”
- Changed “easy, accessible, and fun” to “easy and engaging.”

Considerations:
- Received several comments about how the original was overly focused on the experience of the tool, and insufficiently focused on the broader impact. Wanted to add something that better captured the vision for the world without sacrificing the experience of the tool.
  - Comments on vision for the world aligned around more knowledge/enrichment, and being better informed
- Mixed reactions to the word “fun,” but feedback seemed to tip toward it not quite capturing the gravity of some of the work that’s being done. One group suggested replacing it with “engaging,” which seemed to achieve the same effect without diminishing the seriousness of some of the data.
- Wanted to keep the reference to ease of use, as that was well received.
- Wanted to keep it short/punchy, and avoid wordiness, to the extent possible.

Mission

Revised Mission: Empowering everyone to meaningfully engage with data by providing an accessible open source tool and nurturing a diverse, supportive community.

Original Mission: Empowering everyone to freely engage with data – in all its forms – by providing an accessible open source tool and a diverse, supportive community.

Changes:
- Changed “freely engage” to “meaningfully engage”
- Removed “in all its forms”
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- Added “nurturing”

Considerations:
- Feedback was mostly focused on relatively minor word changes.
- Wanted to capture that the engagement with data is meaningful to better tie it into the vision for the world (desire for greater knowledge/enrichment), and to hint at the idea of user agency.
- Received mostly negative feedback on “in all its forms,” which wasn’t landing and creating confusion about the scope of the tool.
- Wanted to capture the idea of fostering the community, rather than simply providing it. One group suggested the word “nurturing,” which captured that desire well.

Values

Changes:
- Added framing up front to clarify that the values pertain to the community, on the basis that how we work informs the end product.
- Rewrote the descriptions of each value to better and more explicitly address the impact on the tool and the users, as opposed to just the contributors.
- Tightened up the descriptions to:
  - Reduce overlap between values
  - Be more explicit about key concerns facing the tool/community (e.g. privacy)

Considerations:
- Decided to clarify that the values pertain to the community (rationale below), which in turn informs the product.
- Wanted to add context to each description around the impact of the value on the tool to allow OpenRefine to better leverage the values when evaluating the roadmap.
- Wanted to reduce unnecessary overlap between values (while recognizing that a small amount of overlap provides cohesion) by using more specific language around impact and how the value “shows up.”
- Wanted to explicitly incorporate privacy and agency. Considered them as separate values, but ultimately decided they fit cleanly into the descriptions of Transparent & Open and Community-Driven (respectively).

Rationale for focusing values on community:
In our discussion about the values, a central question emerged: should they be focused on the tool, or focused on the community. We carefully considered the arguments on behalf of tool-focused values, but ultimately decided to stick with the community focus, for two primary reasons:
1. When developing entity Vision, Mission, Values statements, values are generally understood to be about people. In this context, products would be ascribed design principles, while values would pertain to the people building or using the product. You often see Values
statements written as “we value...” for this reason. Given our goal of creating shared language and shared understanding, maintaining convention feels important in this case.

2. Shared values are developed in part to facilitate accountability. While Vision and Mission provide clarity into the impact of the work and the entity’s role in achieving that impact, Values statements are meant to tell you about how the work is done. What are the ethics behind it, what motivates the behavior of those doing it, etc. Ideally, these explicit statements can be used to evaluate whether the work is being done in a way that accords with the company’s stated values. Proximity to that goal is much harder to evaluate, and address if the values are focused on the tool itself.

We hope that our upfront framing and the notes we added within the descriptions provide sufficient clarity on the impact on the tool, without shifting the focus off of the community itself. We also hope it provides OpenRefine with a framework for developing or updating more tool-centric policies while maintaining the conventional framing of Values statements.
Appendix C: Discourse Feedback Synthesis

Overview

In July 2024, Bocoup solicited asynchronous input on the draft Vision, Mission, and Values statements via Discourse and OpenRefine’s social media. We received a few messages of general enthusiasm about the project, and one substantive comment on the draft materials.

Output

The substantive feedback included a general note of approval, and two tactical suggestions: (1) Better highlighting the work done with students, particularly the “ethos of training and mentorship,” and (2) More explicitly celebrating the difference in contributors across domain, institution, or country.

Based on this feedback, we updated the values descriptions for Respectful of Diverse Backgrounds & Expertise, Approachable, and Transparent & Open. Specifically, we added references to “thoughtful mentorship and engagement” and “pathways for knowledge-sharing” under the Approachable and Transparent & Open values (respectively), to emphasize that important aspect of OpenRefine’s engagement. We also added “geographies” in the description of diverse backgrounds under the Respectful of Diverse Backgrounds & Expertise value. The value description already referenced celebrating contributor diversity across domains and institutions, but had previously lacked reference to geography.