

# Community Conduct Project - Workflow and Structure

To keep the Community Conduct Project moving forward and ensure all parts of the project get the necessary attention at the right time, I propose we apply a hybrid project management and workflow approach which borrows from user centered design and design sprint methodologies. The workflow is structured into phases, and each phase has defined goals and deliverables.

*Note: This process is designed to allow the group to “bail” at any phase if it is decided that the Community Code of Conduct is not feasible / necessary / possible to create at this time. If the group decides to stop the project, a Post Mortem report is created documenting a) what was done, b) why the project was stopped, and c) further steps. See the graphic flowchart appended to the end of this document for further information.*

## 1. Discovery Phase

<b>Tasks</b>	Find and document existing Codes of Conduct in Open Source, Closed Source, business, and other organizations.	Find and document examples of situations in which a Code of Conduct was applied or would have been applied were it available.	Find and document concerns and arguments against Codes of Conduct.
<b>Goal</b>	Learn from existing Codes of Conduct, find what works and what does not work etc.	Discover what situations Codes of Conduct have been used to mitigate, and what situations a Code of Conduct was missing or not equipped to mitigate.	Surface community and general concerns around Codes of Conduct so they can be addressed early on in the process.
<b>Deliverables</b>	Code of Conduct examples, gap analysis, this, not that lists, good/bad lists.	Organized list of positive/negative incidents a Code of Conduct needs to address.	Organized list of concerns, critiques, and blockers for the introduction of a Community Code of Conduct.

## 2. Research Phase

<b>Tasks</b>	Using materials from Phase 1 + new materials: <ul style="list-style-type: none"> <li>• define global terms for the project including definitions for community member, community spaces, etc.</li> <li>• identify stakeholders, their goals and motivations.</li> <li>• Create personas, persona spectrums, empathy maps, other collateral.</li> </ul>
<b>Goal</b>	Clearly define who the CCoC is for, who it applies to, and under what contexts. Establish fact-based representative personas for affected parties and map their goals, motivations, expectations, and concerns.
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Global definitions</li> <li>• List and definition of stakeholders</li> <li>• Fact-based representative personas</li> </ul>

## 3. Motivation + Goal Definition Phase

<b>Tasks</b>	Based on project and community history, stakeholders, user personas, goals, motivations, expectations, concerns, explore the motivations and goals for a Community Code of Conduct: <ul style="list-style-type: none"> <li>• What values are the CCoC in place to protect?</li> <li>• What are the goals of a CCoC?</li> <li>• What is our motivation for creating a CCoC?</li> <li>• etc.</li> </ul>
<b>Goal</b>	Clearly define the goals and motivations for the CCoC to be used as the core of the Code. These goals and motivations will be used as a litmus test for the Code itself, its enforcement, oversight, and arbitration. For every decision made, we should be able to ask the question “how does this meet the goals and motivations of the CCoC?”
<b>Deliverables</b>	Document defining the goals and motivations of the CCoC. Might take the form of a “WordPress Values” document or similar.

## 4. Pre-Mortem 1

<b>Tasks</b>	Conduct a pre-mortem for the project in its present state.
<b>Goal</b>	Explore all the things that could go wrong with the CCoC based on the what has been created so far. This data will help inform the

	process, reveal gaps or unfinished sections in the planning materials, prepare the project for the next phases.
<b>Deliverables</b>	Pre-mortem report describing (1) all the things that went wrong identifying what issues need to be addressed with existing materials and (2) what issues to look out for as the project moves forward.

### 5. Mapping Phase (journey map, content models, hierarchy)

<b>Tasks</b>	<p>Create journey maps for</p> <ul style="list-style-type: none"> <li>• CCoC itself</li> <li>• Reporting</li> <li>• Event triage</li> <li>• Online triage</li> <li>• Response</li> <li>• Enforcement</li> <li>• Escalation</li> <li>• Oversight (complaints about CCoC enforcement, arbitration, escalation)</li> </ul>	<p>Establish content models for CCoC, event CoC, reporting systems, triage, response, enforcement escalation</p>	<p>Map out process hierarchies and structure for reporting, triage, arbitration, enforcement, escalation, etc.</p>
<b>Goal</b>	<p>Understand the journeys different people may take through the CCoC process,</p>	<p>Document what content is required for publication, use of (reporting), triage, response, enforcement, escalation, and oversight to work effectively.</p>	<p>Based on journey maps and content models, create flowcharts for every aspect of the CCoC process.</p>
<b>Deliverables</b>	<p>Journey maps for people</p> <ul style="list-style-type: none"> <li>• Learning about the CCoC</li> <li>• Reporting a CCoC infraction</li> <li>• Managing the CCoC</li> </ul>	<p>Content models for each major section of the CCoC process.</p>	<p>Flowcharts for each major section of the CCoC process.</p>

	<ul style="list-style-type: none"> <li>• Triaging reports</li> <li>• Handling responses</li> <li>• Providing escalation services</li> <li>• Providing oversight of the process</li> </ul>		
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### 6. Sprint Phase

<b>Tasks</b>	Run design sprints for the CCoC document and reporting	Run design sprints for CCoC management, triage, response, and escalation	Run design sprints for CCoC oversight and arbitration
<b>Goal</b>	Create proposals for the wording and documentation for the CCoC and reporting.	Create proposal for the wording for documentation and procedures around management, triage, response, and escalation	Create proposal for the wording for documentation and procedures around oversight and arbitration.
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• CCoC component proposal</li> <li>• CCoC documentation</li> <li>• Reporting wording</li> <li>• Reporting documentation</li> </ul>	Documentation for CCoC management, triage, response, and escalation (essential “what to do when”)	Documentation for CCoC oversight and arbitration.

### 7. Drafting Phase

<b>Tasks</b>	Create finalized proposal for CCoC including documentation, procedures, etc.
<b>Goal</b>	Produce CCoC etc to be presented to the WordPress community for

	comments and ratification.
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Community Code of Conduct including documentation</li> <li>• Reporting procedure</li> <li>• Reporting forms etc</li> <li>• Documentation for CCoC management</li> <li>• Triage procedures for online and event reports</li> <li>• Documentation and workflow for CCoC response and enforcement</li> <li>• Documentation and workflow for escalation</li> <li>• Documentation and workflow for oversight and arbitration</li> </ul>

### 8. Proposal Phase

<b>Tasks</b>	Present CCoC and procedure proposal to the community for feedback.
<b>Goal</b>	Gather feedback from the community on the proposal.
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>• Introduction posts/documents/videos/etc</li> <li>• Online feedback methods</li> <li>• Online and in-person meetings</li> <li>• other</li> </ul>

### 9. Pre-Mortem 2 / rework

<b>Tasks</b>	Conduct a pre-mortem for the project in its present state. Review community feedback. Loop back to earlier phases where necessary to address issues discovered in pre-mortem and feedback.
<b>Goal</b>	Use community feedback to improve the CCoC.
<b>Deliverables</b>	Revised version of all Drafting Phase deliverables for new proposal phase as necessary.

### 10. Implementation Phase

<b>Tasks</b>	<ul style="list-style-type: none"> <li>• Roll out CCoC, reporting forms, documentation,etc across wordpress.org, WordCamp and Meetup sites, etc.</li> <li>• Provide training for CCoC managers (online and events)</li> <li>• Assign members to Escalation team</li> </ul>
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	<ul style="list-style-type: none"> <li>• Assign members to Oversight committee</li> </ul>
<b>Goal</b>	Use community feedback to improve the CCoC.
<b>Deliverables</b>	See Tasks

11. Review Phase (pre-defined time after implementation)

<b>Tasks</b>	Review all aspects of the CCoC including the text itself, documentation, reporting, enforcement, oversight, arbitration, etc.
<b>Goal</b>	Ensure the CCoC and procedures meet the motivations and goals as defined.
<b>Deliverables</b>	CCoC report to be shared with the community, proposals for alterations, improvements, etc.

