NUMFOCUS - CDR Project

Quantitative and Qualitative interview tool

1. Quantitative survey
2. Qualitative survey

1. Quantitative survey

NUMFOCUS
Contributor Diversification and Retention Research Project

PROJECT CONTRIBUTORS BASELINE SURVEY

Introduction. Thank you for your time to participate in the NumFOCUS Project Contributors Baseline survey. NUMFOCUS is conducting this research in order to guide the Open Source Community on best practices in attracting and retaining diverse contributors in open sources projects. This survey will help NUMFOCUS to establish a baseline in order to assess the success of the diversity strategy. Your participation will require approximately 15 to 20 minutes. There are no known risks or discomforts associated with this survey. Your responses will be kept strictly confidential. Taking part in this study is completely voluntary, but your views are very important to us. Thank you in advance for your collaboration.

Do you agree to proceed?

- Agree
- Disagree

SECTION 1: Background

Q100. Name of the project you are contributor of (you can choose multiple answers): [list of projects]

Q101. Geographic location (where do you live now?) [list of countries]

Q102. Gender

- Male
- Female
- Prefer not to say
- Prefer to Self-Describe (specify)

Q103. Age /___/___/

Q104. Race/Ethnicity

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White

Q105. Country of origin [list of countries]

Q106. Citizenship [list of countries]

Q107. What is your primary language [list of languages]

Q108. (IF English is not your primary language) How comfortable are you with

- Q108.1. Writing in english [scale]
- Q108.2. Reading english [scale]
- Q108.3. Oral expression in english [scale]

Q109. What is your highest education attained?

- No formal Education
- High School
- Bachelor degree
- Master degree
- Phd

Q110 Socioeconomic status (range)

- Working class/among the poorest in the country
- Middle class/among the average in the country
- Wealthier than average in the country

Q111. Do you have a disability ? (check all that apply)
- Yes, Cognitive
- Yes, Emotional
- Yes, Hearing
- Yes, Physical
- Yes, Visual

- Yes, Self Identify*
- No
- Prefer not to answer

Q112. How many years of experience do you have contributing to open source? /___/___/

SECTION 2: PATTERN OF CONTRIBUTION

200. How long have you been a contributor on (project)

- Less than a year
- 1-2 years
- 3-4 years
- 5 years and more

201. What was your expectation in deciding to become a contributor to (project)

_____
_____
_____
_____

202. How often do you contribute to (project) (multiple choice)?

- Very frequently
- Occasionally
- Rarely
- Have never contributed

203. When was the last time you contributed (choice with periode list)?

- A month or less ago
- 2-6 months ago
- More than 6 months ago
- Greater than a year

204. (IF Q202 More than 6 months) What factors contributed to the length of time in between contributions or led to you no longer contributing?

SECTION 3: CONTRIBUTORS DIVERSITY AND RETENTION

302. Do you consider yourself as a-member of an underrepresented group?

- Yes
- No

303. In your opinion does (project) encourage and/or promote diversity, equity and inclusion??

- Yes
- No

304. Can you explain your answer with some examples?

_____

_____

_____

_____

Q305. How would you rate the diversity of (project) contributors in comparison with similar projects

- (Project) is outstanding on the diversity scale as compared with similar projects
- (Project) contributor base is slightly more diverse than similar projects
- (Project) contributor base is slightly less diverse than similar projects
- (Project) contributor base is very homogeneous, we would like to improve

Q306. Would you like to share any success stories about your participation in the project related to attracting and/or retaining underrepresented groups?

_____
_____
_____
_____
_____

Q307. Have you witnessed any challenges faced by (project) in retaining underrepresented group, please explain

_____
_____
_____
_____
_____

Thank you for your contribution to our research!

2. Qualitative survey

CDR Research Project - Moore #9113

Qualitative Interview Questions

Informed consent

Interviewee Details:

- Type of Contributor (first time, active, drop off):
- Underrepresented? (yes, no)
- Project: JuMP

Hello, my name is _____. I work with NumFOCUS as a researcher. [Your Project] and 19 other open source projects are participating in a research project being conducted by NumFOCUS. The research is looking into understanding the diversity, inclusion and barriers to participation within NumFOCUS-sponsored projects and the wider open source community.
Last year we completed a quantitative survey, where we interviewed more than 300 participants from the participating research project.

Thank you for your availability to share your experience with us.

Privacy and confidentiality: The responses you will provide are confidential. They will not be used to identify you or quote you.

Duration: The interview will last an hour maximum.

Recording: We would like to record the interview, for us to double check our notes later and make sure we did not miss anything. After transcription, the recording will be deleted from our system. They will be kept for a maximum of 3 months. Do you agree?

- *Get confirmation that they are OK to record. We can start the recording and ask these questions to get an affirmative answer on the record. If they decline we stop the recording and take notes.*

If I ask you any question you don't want to answer, just let me know and I will go on to the next question or you can stop the interview at any time.

Do you have any questions before we proceed? Do you agree to move forward?

Introduction/Context

Where do you live?
What is your main occupation?

Theme 1: History of contribution to the project

Objective: Specific practices used within projects that relate to onboarding new contributors and retaining existing contributors.

> **Question:** Can you please tell us about your history with the project -
> - How did you find out about the project?
> - What factors made you decide to become a contributor to the project?
> - For how long have you been contributing to the project?
> - **How do you interact with the community?**
>
> **Question:** How was the onboarding process?
>
> **Question:** What are the policies and procedures in place to support contributor diversity and inclusion? Can you give some specific examples?
>
> **Question:** In your experience, were there any differences between the documentation and the practice of the project in relation to diversity and inclusion?

Theme 2: The project, diversity and inclusion

Objective: Understand via personal experiences the successes and challenges of diversity and retention within their open source community.

> **Question:** Do you identify as a non representative group among project contributors? In which way? Was this a limiting factor to your contribution to the project?
>
> **Question:** What if any action did the project take to smooth your participation and integration among the team?
>
> **Question:** What contribution/s are you most proud of?
>
> **Question:** Did you face any challenge in collaborating with the project? Can you tell us more about your challenging experience, story behind this?

Theme 3:

Objective: Extract sentiment around the success/challenges of the above practices to help determine their usefulness to other NF projects and the broader open source community.

> **Question**: Did you face a situation where you were frustrated with the project? Can you tell us more about it?
>
> **Question:** How do you currently feel as a contributor to the project?
>
> Prompt: **Which types of interactions do you prefer and why? Which types of interactions do not work for you and why?**
>
> For active contributors
> **Question:** Why do you continue to contribute?
>
> **Question:** What does the project do (practices) that keep you contributing?
>
> For contributors who stop contributing

Question: Why did you stop contributing to the project?

Question: In general, what is your assessment of open source community diversity and inclusiveness?

Theme 4: Findings from the quantitative survey

Objective: Dig deeper into areas of interest highlighted from the quantitative survey as identified by the Project Leads.

> **Question:** Prior to this study, NumFocus have conducted a quantitative survey which came out with the following findings
>
> 1. The profile of a typical contributor can be summarized as upper class, highly educated, white male from North America and/or Central and Western Europe;
> 2. 14% of contributors consider themselves a member of URM groups. With gender, nationality and race being the largest categories.
> 3. People with disabilities and those who said they are from a minority group are less likely to feel included as compared with other respondents;

Based on your experience as a contributor, do you agree or disagree with these findings? Do you have any specific examples or stories to tell?

Recommendations from the Interviewee

Question: Do you have any recommendations for the open source community, donors in general on how to promote diversity and inclusion in open source projects?

Followup
Do you have in mind someone who can provide more information on diversity in open source communities?