

Tentative timeline:

- **Week of Sep 19, 2022** - OpenRefine's mailing lists are informed about this plan and can respond and comment for two weeks
- **Week of Oct 3, 2022** - Decision go/no go based on feedback
- **Around the first weeks of November** (depending on availability of Antonin, Sandra and volunteers) - start of actual migration to Discourse
- **End November 2022** - OpenRefine's community uses Discourse for communications and mailing lists are now read-only!

Some active OpenRefine community members (Antonin, Sandra, the OpenRefine advisory committee) have been talking about ways to make OpenRefine's community more lively, active and diverse: encouraging as many OpenRefine community members as possible to help each other and the project - both end users and developers, regardless of skill level. As one step, we strongly consider moving the current main community communication channels (the user mailing list and developer mailing list) to a public, web-based forum, using [Discourse](#).

We asked the OpenRefine user community about their communications preferences in the [recent 2022 user survey](#). There, a web-based forum was the most popular option, although our current mailing lists also received a lot of votes. Slack was mentioned as the third most popular option, but (as we explain below) we prefer a platform which is open source and accessible to anyone with a web browser.

Why Discourse?

- Discourse is 'advanced' forum software, very focused on building a friendly and active community. It is open source and quite [widely used](#).
- Some of us have already used Discourse in other contexts (Japanese language learning, Wikimedia community). It is also used by 'friends' - e.g. [OpenStreetMap](#), [Open Source Design](#).
- We can import ([current Google groups](#)) and export conversations (if we decide to move on towards a different forum or discussion platform).
- Allows a wide diversity of ways to authenticate / log in.
- Offers refined features to subscribe and stay informed about topics and discussions you are interested in.
- See below for more pros/cons we are considering.

When and how would OpenRefine move to Discourse?

- We want to give the community the opportunity to give feedback on this decision, and will only move if we feel that there is sufficient buy-in.
- In that case, we will make the move somewhere in the last months of 2022. We don't have a hard deadline but do want to make progress.

- OpenRefine's core team is small; the main work on the move will be done by OpenRefine's project director (Sandra Fauconnier). We very much welcome people who want to help with the move; please [email Sandra](#) if you volunteer to help.
- We think it makes sense to have a test period of 2 weeks (free trial period offered by Discourse). Let Sandra know if you are interested in giving the forum a try and helping with transitions during this test period.

Discourse versus other platforms and solutions

Platform	Pros	Cons	Will we (continue to) use this?
GitHub issues	Developer- and code-focused place for tracking detailed things to work on	Not good for broader discussions (design directions, roadmap...)	Certainly (although the core OpenRefine group sometimes discusses moving to a more 'open' platform e.g. GitLab)
GitHub discussions	<p>Lightweight forum functionality that is well integrated with GitHub</p> <p>Free (as in beer)</p> <p>Really easy to get started with (just one click)</p> <p>Allows broader discussions beyond GitHub issues</p>	<p>Requires a GitHub account to participate</p> <p>Integrated with a developer-focused platform (GitHub) and probably less obvious / easy / inviting for OpenRefine's general end users</p>	Probably not (or maybe for smaller projects like the SPARQL Importer extension)
User mailing list (Google Groups) and developer mailing list (Google Groups)	<p>Email is a simple communication channel that many people use professionally.</p> <p>Second most popular option in OpenRefine's 2022 user survey</p>	<p>Dependence on Google infrastructure</p> <p>Email and mailing lists are not the best tools for community building</p>	Preferably not, or only in a very limited way. We want to replace both mailing lists with the Discourse forum.
Self-hosted mailing lists	See above	Email and mailing lists are not the best tools for community building	No

		Would require us to figure out hosting (due to the small core team, we prefer not to self-host)	
Slack	<p>Used by many OpenRefine end users in other professional contexts.</p> <p>Third most popular option in OpenRefine's 2022 user survey.</p>	<p>Proprietary platform</p> <p>Difficult to impossible to search for old discussions</p> <p>Favors real-time conversations, while we are looking for asynchronous conversations</p> <p>Not indexed by search engines</p>	Probably not (or maybe only for specific, dedicated funded projects where a lot of day to day work communication is needed)
Mattermost (open source Slack alternative) / Zulip	Open source software, very similar to Slack	<p>No very high adoption yet. Not a very popular option in OpenRefine's 2022 user survey.</p> <p>Not web based, so not indexed by search engines.</p> <p>Would require us to figure out hosting (due to the small core team, we prefer not to self-host)</p>	No
Gitter	<p>Good for quick and informal chats</p> <p>Integrated with GitHub</p>	Very developer-centric; the application and platform are not used by many people	Currently used, but probably to be shut down and to move to Discourse instead
Discourse	<p>Easy to use, also by beginners and non-technical people</p> <p>Keeps OpenRefine more independent</p>	Community management may become a lot of work if the forum becomes successful (although that would be great).	Yes, we'd like to move to a Discourse forum.

	from closed solutions hosted by Google/Microsoft	We hope the community itself will help!	
	Indexable by search engines		

How would this work? Who pays for it and who manages it?

- We would choose a [hosted version of Discourse](#), probably at a URL like forum.openrefine.org
- Such a hosted version costs [USD 300/year \(standard plan with 50% non-profit discount\)](#), which we hope to pay through user donations ([you can donate here](#)).
- OpenRefine's paid staff is very small. We hope that OpenRefine's already very helpful community will jump in and help manage the forum and discussions, as a contribution to our open source project. Discourse software itself encourages this process with built-in features: it rewards positive contributions and trusted contributors with additional rights.

Would this entirely replace the OpenRefine developer and user mailing lists?

- Ideally: yes (see comparison with other platforms above for reasons why). If you prefer communicating via email: Discourse also allows you to subscribe by email to specific threads you follow, and reply to them inside your email application.

Which types of community communication are probably NOT well served by a Discourse forum?

- Newsletter style messages. With the current user mailing list, we can reach many OpenRefine users at once, for instance when the core OpenRefine network wants to spread the word about job opportunities, user surveys and other topics that need attention from the entire community.
- More informal chats (Slack or instant messaging style). This kind of chat currently takes place on Gitter (which, however, is very developer-focused). The Wikimedia movement also has a Telegram channel for Wikimedians.

Which conversations would fit well on OpenRefine's Discourse forum?

We hope that a Discourse forum will encourage more, and more diverse and specialized, public conversations in OpenRefine's community - including conversations that would not naturally take place on a single large mailing list. Examples may include:

- The typical questions and requests for support that are currently posted on OpenRefine's user mailing list are of course also very welcome on the Discourse forum.
- A subforum / threads for OpenRefine trainers and teachers, talking about best practices, good current materials, giving each other feedback...

- Subforum(s) / threads for OpenRefine's interface translators (the people who help us by using Weblate to translate OpenRefine's UI), sharing best practices and improving OpenRefine's translation guidelines on Weblate
- Subforum(s) / threads in languages other than English, providing discussion space for OpenRefine communities working in e.g. Spanish, Portuguese, French, Japanese, Arabic and many more
- Subforum(s) for extension developers to communicate with, and support, their users
- Discussions about prioritization of features, and other community decisionmaking; making use of the polling options that Discourse offers
- Discussions about major feature requests and items on OpenRefine's roadmap, which are too broad for GitHub issues
- Perhaps a marketplace (supply & demand) of trainings and services around OpenRefine
- ...

Conversations that will not be suitable for the Discourse forum, or that are OK to take place elsewhere

- A lot of people ask questions about OpenRefine usage in various external forums and websites, including StackOverflow. This is great - it keeps OpenRefine visible in many places. Questions and answers posted on StackOverflow are also well discoverable via search engines. We don't want to discourage this!
- Some discussions may be confidential (e.g. related to the Code of Conduct, or security vulnerabilities), so there may be some private threads and discussions, or these discussions may take place via e-mail only.