FOLIO Project Code of Conduct

Preamble to the DRAFT

FOLIO needs a code of conduct. We used to have one, but it was geared towards meetings and didn't include the other areas where the community acted. It was lost among the website rejuggling a couple of years ago anyway. This document is heavily based on the Islandora Foundation's Code-of-Conduct plus some additions from Code4Lib and other places.

Proposed process:

1. Request volunteers from PC, TC, SIGs, and developers to complete this draft. A group of 5-6 would be ideal. Peter Murray volunteers to convene the group.
2. The volunteers request input from the members of the community that they work with over a few weeks. The draft is also sent to the all-sigs mailing list, posted to discuss.folio.org, and included in the FOLIO newsletter.
3. The volunteer group meets to reconcile comments from the community over one or two virtual meetings. The result is the final version of the *FOLIO Project Code of Conduct*.
4. The PC, TC, and FOLIO Stakeholders are asked to affirm/approve the document.
5. The *Code of Conduct* is posted to the COMMUNITY space on wiki.folio.org and is added to the "Overview" drop-down menu of the project-wide header.
6. Go through the process of identifying Community Support Volunteers.
7. A presentation on the *Code of Conduct* is made early at the WOLFcon plenary session, including identification of the Community Support Volunteers.

This Community Code of Conduct covers our behavior as members of the FOLIO Community, in any forum, mailing list, wiki, web site, chat channel, public meeting, conference, or private correspondence. Here is how we agree to operate:

- **We are considerate.** We are all in this together. Our work on the FOLIO project affects users, developers, project managers, and many others with a stake in FOLIO as both a piece of software and a community. We will keep these other groups in mind when making decisions.
- **We are inclusive.** We explicitly value the contributions of our members who belong to groups who have been historically oppressed, and acknowledge that they face barriers to access our community. We aim to center them, lift up their voices, and provide additional assistance and resources when necessary.
- **We are respectful.** Everyone can make a valuable contribution to FOLIO, regardless of age; appearance or body size; employment or military status; ethnicity; family status; gender identity or expression; immigration status; marital status; national origin; physical or cognitive ability; political affiliation; sexual orientation; race; or religion, and all contributions are welcome. This list will grow as our community grows and as language evolves.
- **When we disagree, we do this in a polite and professional manner.** We may not always agree. When frustrated, we back away and look for good intentions, not reasons to be more frustrated. When we see a flaw in a contribution, we offer guidance on how to fix it.

- **We are collaborative.** Collaboration is vital to the FOLIO project and related open source communities. We work with our own institutional teams, with other teams in the FOLIO community, and with collaborators outside of our community on related projects. We collaborate to reduce redundancy, to share knowledge, to improve our product, and to perfect our processes. We strive to do our work as transparently as possible and we welcome new collaborators with enthusiasm. We also follow community guidelines for how to collaborate, including workflows and documented practices for contributing to the project.
- **When we disagree about how the community or the FOLIO platform should work, we consult others.** It is important that we resolve disagreements and differing views constructively and with the help of the community and community processes. We have Special Interest Groups, the Product Council, the Technical Council, and the FOLIO Stakeholders who can all be consulted on the proper direction to resolve a given conflict.
- **We say thank you and let people know when they have done good work.** It is a small thing, but it means a lot. When someone makes a contribution, helps us with a problem, or otherwise goes out of their way to make our work easier, we thank them.
- **When we are unsure, we ask for help.** Nobody knows everything, and nobody is expected to be perfect in the FOLIO community. Everyone here was new once. Questions are highly encouraged and add to the community's base of knowledge. Questions will always be treated respectfully.
- **We are respectful of each other's time.** Much of the work done in this community is by volunteers. The depth of experience in the community is a great resource, but not an infinite one. When we get help, we try to give back as well.
- **We try not to leave holes when we depart.** Members of every project come and go. We document our work throughout the process so that if we leave, continuity is possible. When somebody leaves or disengages from the project, in whole or in part, we ask that they do so in a way that minimizes disruption to the project.
- **We are a community of professionals, and we conduct ourselves professionally.** Be kind to others. Do not insult or put down other participants or other communities and projects. Harassment and other exclusionary behavior aren't acceptable. This includes, but is not limited to:
    - Violent threats or language directed against another person.
    - Discriminatory jokes and language, such as but not limited to ableist, ageist, elitist, fatphobic, racist, sexist, anti-immigrant, transphobic, or homophobic behavior or language.
    - Not using an individual's preferred name and/or pronouns.
    - Posting sexually explicit or violent material.
    - Posting (or threatening to post) other people's personally identifying information ("doxxing").
    - Personal insults, especially those using racist or sexist terms.
    - Unwelcome sexual attention, physical contact, deliberate intimidation, stalking, or following.
    - Sustained disruption of talks, events, or other community work.
    - Repeated harassment of others. In general, if someone asks you to stop, then stop.
    - Advocating for, or encouraging, any of the above behavior.

As this document outlines, participants in the FOLIO community seek to foster a generally positive and supportive environment. To protect the community, we will not tolerate *ad hominem* attacks on community members or disparagement of the project by individuals with an agenda

harmful to the project. We pride ourselves on building a productive, happy, and flexible community that can welcome new ideas in a complex field, and foster collaboration between groups with, ultimately, the same needs, interests and goals.

Community members who violate these guidelines will be notified and asked to change their behavior. Violations may result in loss of membership in project groups, revocation of special access to project resources, and/or loss of access to project communication channels (mailing list, chat, GitHub, and others).

Offenders may be asked to stop participating in the project or directed to filter their participation through another member of their institution (if applicable).

Community Support Volunteers

The Community Support Volunteers (CSVs) is a small group of kind, articulate, and trustworthy people who reflect the diversity of the FOLIO community. CSVs are responsible for:

- Taking reports of code of conduct violations
- Referring reporters to appropriate services (e.g. conference staff for incident response, medical or other emergency services)
- Participating in decisions about responses to code of conduct violations
- Participating in responses as appropriate.

CSVs are appointed by the FOLIO Product Council and endorsed by the FOLIO Stakeholders. CSVs are trained to follow the policies and procedures described in this document and linked documents. The current FOLIO Community Support Volunteers are:

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More information about the CSVs is on the Community Support Volunteers resource page.

Reporting Guidelines

If you believe someone is violating the code of conduct we ask that you report it to the FOLIO Community Support Volunteers (CSVs) by emailing csv@folio.org or filling this form with an anonymous option. Responses are monitored by the CSVs. If you are not comfortable contacting the CSVs with your report, you may contact the Product Council chair or FOLIO Stakeholders chair. All reports will be kept confidential unless there is a legal obligation to disclose (for example, mandatory reporting of a crime). In some cases CSVs may determine that a public statement will need to be made. If that's the case, the identities of the victims and reporters will remain confidential unless those individuals instruct the CSVs otherwise.

If you believe anyone is in physical danger, please notify appropriate law enforcement first. If you are unsure what law enforcement agency is appropriate, please include this in your report and the CSVs will attempt to notify them.

In your report please include:

- Your contact info (so CSVs can get in touch with you if follow up is needed)
- Names (real, nicknames, or pseudonyms) of any individuals involved. If there were other witnesses besides you, please try to include them as well.
- When and where the incident occurred. Please be as specific as possible.
- Your account of what occurred. If there is a publicly available record (e.g. a mailing list archive or a public IRC logger) please include a link.
- Any extra context you believe existed for the incident.
- If you believe this incident is ongoing.
- Any other information you believe we should have.

What happens after you file a report?

You will receive an email from a CSV acknowledging receipt. The CSVs will meet to review the incident and determine:

- What happened.
- Whether this event constitutes a code of conduct violation.
- Who the bad actor was.
- Whether this is an ongoing situation, or if there is a threat to anyone's physical safety.

In the event that a member of the CSVs or FOLIO Stakeholders is involved in the incident:

- That member agrees to recuse themselves of any discussion, and
- The CSVs or FOLIO Stakeholders will communicate about the reported issue outside of channels that include that member.

If this is determined to be an ongoing incident or a threat to physical safety, the CSVs' immediate priority will be to protect everyone involved. This means the CSVs may delay an "official" response until they believe that the situation has ended and that everyone is physically safe. Once the CSVs have a complete account of the events they will make a decision as to how to respond. Responses may include:

- Nothing (if we determined no violation occurred).
- A private reprimand from the CSVs to the individual(s) involved.
- A public reprimand.
- An imposed vacation (i.e. asking someone to "take a week off" from the project).
- A permanent or temporary ban from some or all FOLIO spaces (mailing lists, chat, etc.)
- A request for a public or private apology.

CSVs aim to respond within one week to the person who filed the report with either a resolution or an explanation of why the situation is not yet resolved. Once the CSVs determined the final action, a CSV will contact the original reporter to let them know what action (if any) we'll be taking. CSVs will take into account feedback from the reporter on the appropriateness of our response, but they don't guarantee they will act on it.

Finally, the CSVs will make a report on the situation to the FOLIO Stakeholders. The FOLIO Stakeholders may choose to make a public report of the incident. If so, the identities of the victims and reporters will remain confidential unless those individuals instruct us otherwise.

Appeal Process

Only permanent resolutions (such as bans) may be appealed. To appeal a decision of the CSVs, contact the FOLIO Stakeholders at stakeholders@folio.org with your appeal and the FOLIO Stakeholders will review the case. If there is a potential conflict of interest, parties will be asked to recuse themselves.

Ideas and text modelled on the Codes of Conduct of the Islandora Community, Code4Lib community, Django Software Foundation and OpenStack

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