

Report and Recommendations Open Data Kit 2019 Convening

October 11-13, 2019

Seattle, Washington

Prepared by:

We Can Work it Out, LLC,



November 2019



Contents

2019 Convening Background	2
I. Convening Goals	3
II. Final Outcomes and Recommendations	4
III. Narrative Summary of Key Agenda Items	5
Friday, October 11, 2019	5
Saturday, October 12, 2019	8
Sunday, October 13, 2019	9
IV. Challenges and Risks	10
Organizational and Logistical Challenges	10
Process and Content Challenges	10
APPENDIX A - Success Stories and Cool Tools Presentations	12
APPENDIX B - TSC Breakout Session Summaries and Notes	13



2019 Convening Background

We Can Work It Out, LLC was contracted by the Open Data Kit (ODK) Project Management Committee (PMC) in July of 2019 to support the PMC in delivering a productive convening in October of 2019 in Seattle, WA.

At its first convening in 2017, the ODK community created a transition plan to establish project governance structures and funding sources independent of the University of Washington, Seattle campus, where the project was developed in 2008 under the leadership of Gaetano Borriello.

A transitional PMC, seated at the 2017 convening, made significant progress on this transition plan, including drafting and adopting organizational Mission and Values statements, launching the ODK website, re-naming ODK-2 to ODK-X, and creating governance structures for, and populating, two Technical Steering Committees (TSC), which manage the day-to-day operations of the ODK (TSC-1) and ODK-X (TSC-2) tool suites. The success of their work can be seen in the vibrant and growing user base for both tool suites and the reputation of the ODK community as the global leader in data collection in under resourced areas.

The plan developed at the 2017 convening also tasked the PMC with creating a ‘transition board’ which would oversee the work of establishing an on-going governance structure for the ODK Community including the composition of, and a process for seating, future PMCs. This idea was abandoned in January 2018 and the sitting PMC took on the task.

The PMC posted a proposed governance structure to the ODK Forum for consideration and feedback on May 27, 2019. Posted comments from community members reflected tensions between the two TSCs which manifested in discussions about proportional representation of TSC members on the PMC. The group was unable to resolve this issue prior to the second convening. Along with providing convening participants with significant face-to-face technical work time, the transitional PMC identified the adoption of a governance structure that would be acceptable to both TSCs and the broader ODK Community, as a high priority for the second convening.



I. Convening Goals

The consultants facilitated three agenda planning calls with the Project Management Committee (PMC), individual interviews with each PMC member, and calls with the TSCs. A wide range of issues and perspectives surfaced during these conversations including ideas around the governance structure; the desire to improve communication between the TSCs; and, the possibility of merging the two tool suites.

Additionally, a pivotal issue that emerged was the possibility that TSC-1 would choose to move forward under an independent governance structure.

The consultants consolidated these conversations and concerns, and in collaboration with the PMC, developed a final agenda organized to achieve each of the following goals:

- Convening attendees will a) get to know each other better, b) increase their knowledge and understanding of the Open Data Kit Community's history, c) increase their knowledge and understanding of the scope of Open Data Kit project deployments, and, d) volunteer to work on specific tasks.
- Provide both TSCs with opportunities to learn about each others' projects and work collaboratively on shared technical issues.
- Review, amend and consent on a Governance Structure for ODK.
- Address entrenched dynamics and challenges around naming / branding.
- Provide significant time for individual TSC-level technical work.



II. Final Outcomes and Recommendations

Final Outcomes

As a result of the convening, the following outcomes were achieved:

- Adoption of final ODK Governance Structure and reduction of tensions around governance issues.
 - Two Leadership breakout sessions totalling 4.25 hours resulted in an approved and amended governance structure which empowers each TSC to manage its own on-line resources, marketing, branding and funding and assigns management of any shared resources to the PMC.
 - The agreed on governance structure and process for seating the next PMC provides a process and structure for making future amendments as needed.
 - Adoption of full consensus decision-making at the PMC level supports collaborative, solution oriented problem-solving.
- Newer members are engaged in leadership opportunities, and have made commitments to participate in activities that address one or more of the following challenges:
 - Improving docs and tool presentation on the website.
 - Increased sharing between developers and users.
 - Engaging funders and developing alternative models for funding.
- 24 hours of concurrent breakout session time for face-to-face technical work provided significant time to focus on TSC-identified priorities.
 - Task identification and prioritization for over 11 topic areas.
 - Updated project roadmaps with timelines and task delegation for both ODK / ODK-X.

Recommendations:

Consultants recommend that:

- TSC-1 and TSC-2 adopt full consensus decision-making for complex issues or issues where there are clear and significant differences of opinion on concerns fundamental to the future planning and sustainability of the project.
- The PMC and both TSCs receive training around using full-consensus for their decision-making processes.
- The new PMC utilize outside, professional facilitation for its meetings until it has received training in effective full-consensus processes.
- All TSCs and the PMC jointly meet together on a regular basis.
- The current (and any future) TSCs regularly share financial reports with each other and the PMC.
- The TSCs (and PMC as needed) develop processes and procedures for supporting greater engagement by new volunteers and community members, and the management of their activities.
- All TSCs regularly share success stories and deployment highlights with each other.



III. Narrative Summary of Key Agenda Items

Friday, October 11, 2019

Speed Networking Session

Participants met in groups of two or three with someone they did not know or wanted to know better. Participants spent five minutes during each of five rounds sharing their names, where they live, the projects on which they were working and its importance to them, and why they decided to attend the convening.

Success Stories

Successful projects from both TSC's were featured in five minute presentations. For more details see [Appendix A](#) for a list of presenters and the publicly shared presentations.

Historical Timeline Exercise

Participants collaboratively created [a historical timeline](#) of the ODK community, from its inception through the 2019 convening, using larger post-its to capture major events and smaller post-its to record the years in which individual members joined. This was particularly helpful for newer members who did not know the origin story of the community.

Summary Review of First Convening

Waylon gave a brief [summary](#) of the first convening held in 2017, including the decisions made, questions raised and subsequent actions taken.

Review of ODK Mission, Values and Code of ConductThe consultants posted an excerpt from the ODK Code of Conduct pledge to “mak(e) participation in our project and our community a harassment-free experience for everyone” and led the group through a brief review of the ODK [Mission and Values](#) and [Code of Conduct](#).

ODK Community Sharing Circle

The consultants opened the sharing circle conversation by listing the issues and ideas surfaced in pre-convening interviews. Consultants asked the group: “What has gone well and what has been challenging since the last convening?” with the expectation that TSC-1 members would take this opportunity to articulate their concerns about continuing under a shared governance structure. TSC-1 members did not voice their concerns at this time. During the sharing circle participants generated the following list of Challenges and Successes:

What is Going Well:

- Effective tools / New Features
- Support and interactions of larger community via the online Forum and use of Github
- TSC Project Management / Appreciation for the “coders”
- Multiple successful deployments / Being Deployment centric
- People enjoy participating in, and contributing to, the work of maintaining the ODK community.



We Can Work It Out, LLC

Facilitation / Consulting

Challenges:

- Staying user-centric and the need for programmers to be in the field more frequently to understand and support features that best meet users' needs
- Tensions between the TSCs and the need for more frequent communication between ODK and ODK-X steering committees / Avoiding duplication
- Finding time to work on ODK while keeping "my day job"
- Concerns about on-going project funding:
 - Support for core infrastructure and administrative work
 - All our eggs are in the Nafundi basket
 - Lack of capacity to grant write for software development
- Not having an agreed-on permanent governance structure
- Better technical documentation for on-boarding new people
- Marketing tool suites to potential new users

Responding to Emerging Needs: Splitting the Friday Afternoon Plenary

Critical concerns about the future governance structure for the two tool suites did not surface as anticipated during the Community Sharing Circle (see above). A governance structure discussion, which hinged on the as yet unresolved possibility that TSC-1 would leave the joint project governance, was planned for the end of Friday's agenda. In an effort to surface and resolve this issue before the Friday afternoon discussion, the consultants made the decision to split the plenary into two subgroups and run concurrent sessions, one with a leadership group composed of the PMC and TSC-1 / TSC-2 members, which would explore and discuss TSC-1's concerns, and one with the remainder of the convening participants, which would continue to problem-solve around other challenges identified during the sharing circle.

Concurrent Session A: Leadership Breakout Discussion

Given the concerns TSC-1 members had shared with the consultants prior to the convening, this breakout session with project leadership focused on surfacing and exploring the challenges that would need to be addressed for both tools suites to remain under a shared governance structure, as well as clarifying the benefits of the tool suites remaining together. The group also clarified what resources are shared by the two tool suites.

- Three critical areas of concern were identified:
 - Governance
 - Branding / Naming
 - Funding
- Two primary benefits of staying together were articulated:
 - Provides a bigger pool of shared knowledge for users and developers to draw on
 - A shared brand offers more variety / solutions for users

Each of three self-assigned groups were tasked with generating strategies which would maximize the benefits and minimize the challenges for one of the identified areas of concern.



We Can Work It Out, LLC

Facilitation / Consulting

All three groups identified possible solutions for their area of concern that envisioned both tool suites remaining together in some form. Suggestions included: start or join a software conservancy, expand PMC membership to include non-TSC members, give more autonomy to the TSCs to manage their marketing and funding sources, collect more information on the impact of shared branding on marketing and fundraising, and improve the interoperability of the two tool suites.

Although this session did not resolve TSC-1's concerns about moving forward under a shared governance structure, significant work was done and the session concluded with a request from the group to continue the discussion at a later time during the current convening.

Concurrent Session B: General Membership Breakout Activity

Participants who were not on either the PMC or a TSC reviewed the challenges identified in the community sharing circle, added to the list, and then prioritized the top concerns.

Participants then developed solutions for the top three challenges, and made individual commitments to [implementing those solutions](#).

Governance Structure

Despite TSC-1's still unresolved issues around moving forward under a shared governance structure, the consultants chose to lead the full group through a detailed review, amendment and consensus-based approval process for the current [governance proposal](#) for the following reasons:

- There would be no significant plenary time to work with the full group during the rest of the convening.
- Whatever course lay ahead, an agreed-upon governance structure with clearly defined roles, responsibilities and decision-making processes would be in place to support any needed future amendments.
- Adopting a governance structure during the convening was a high priority for the PMC.
- The process provided the group with a lived experience of effective consensus-based discussion and decision-making.

The result of this plenary session was a fully approved document that, as anticipated, was later modified by the leadership team to meet emerging needs.

The Friday, October 11, 2019 agenda also included:

Goals and Current Priorities for TSC-1 and TSC-2 Yaw gave a brief report for [TSC 1](#), and Waylon for [TSC 2](#), of their recent accomplishments and priority projects for the next year.

Consensus Primer

The consultants planned to give a brief presentation on the consensus decision-making process, but opted for a summary explanation instead to address time constraints. However, participants, especially members of the TSCs, requested a copy of the [Consensus Primer](#).



Saturday, October 12, 2019

Saturday's activities consisted of breakout sessions, organized by the TSCs, and focused on technical work and planning for each tool suite. See [Appendix B](#) for summaries of each breakout and notes from the sessions.

Cool Tools Demos

Six presenters demonstrated new tools. For links to these presentations see [Appendix A](#)

Responding to Emerging Needs

- **Nafundi Lunch Presentation**

The consultants asked Yaw to present his overview of Nafundi's role as a primary funding source for ODK to the plenary over lunch on Saturday. The original presentation was made during a Friday morning TSC-1 breakout session titled: How Work Gets Done Now And In The Future. Because Nafundi's role also impacts TSC-2, the consultants felt it was important to make this information available to the whole membership.

- **Follow-up Leadership Breakout Session**

In response to the request to continue the discussion at the end of the first Leadership Breakout Session on Friday, the consultants organized a second Leadership Breakout Session for Saturday afternoon.

During this session, with support from the consultants, TSC-1 leadership clearly and fully articulated the challenges around funding and marketing under a shared governance structure that were pushing them to seriously consider forming an independently governed organization.

After this presentation, the consultants supported the group in identifying possible solutions. The group re-surfaced a suggestion from the first breakout session and developed it into a proposal to shift governing authority from the PMC down to the TSCs.

The group condensed on an amended governance structure that would assign the management of shared resources, including a shared website, shared forum and shared Github account to the PMC, while each TSC would manage its own web presence, branding/marketing and fundraising.

The group had a fruitful discussion about naming / branding issues, surfacing meaningful options that had not been on the table previously, including: the possibility of rebranding ODK while restricting the use of the ODK name by others, the possibility of rebranding ODK-X, and the possibility of creating new logos to better differentiate the tool suites.

Wrap-up for this session included delegating next steps for implementation as follows:

- Waylon
 - Update the governance document agreed on in the Friday plenary to reflect changes in the role of the PMC and the TSCs' authority.



We Can Work It Out, LLC

Facilitation / Consulting

- Yaw
 - Review / assess costs and create an implementation timeline for creating tool suite-specific web resources.
- Yaw and Waylon
 - Communicate these agreed-on changes in governance to their respective TSCs as well as to the larger ODK Community.

Sunday, October 13, 2019

Sunday's activities consisted of breakout sessions organized by the TSCs which focused on technical work and planning for each tool suite. See [Appendix B](#) for summaries of each breakout and notes from the sessions.



IV. Challenges and Risks

Organizational and Logistical Challenges

Breakout Session Scheduling

Due to lack of content expertise, consultants relied on the TSCs to identify and prioritize breakout session content. Consultants provided support for this process by suggesting that a “honcho” or point person be assigned to each breakout session and that, if possible, the “honcho” prepare materials for their sessions prior to the convening. Consultants were available to help with co-facilitation of breakout sessions, if requested. PMC members organized the scheduling of breakout session topics.

Note Taking

Consultants did not provide note taking support for the breakout sessions. TSC leadership coordinated and implemented a shared note taking protocol that had been used at the prior convening. In collaboration with ODK organizers, consultants have provided a condensed listing of breakout session notes at the end of this report. See [Appendix B](#) for breakout summaries and session notes.

Process and Content Challenges

Discovery

Pre-convening conversations with ODK leadership (the PMC and members of both TSCs) revealed that lack of consistent communication between the TSCs had resulted in substantially differing perspectives on the future governance of, and relationship between, the two tool suites:

- Prior to the convening TSC-1 members were more likely to suggest that separating the tool suites into two independently governed organizations was the preferred way to move forward.
- TSC-2 members were more likely to acknowledge the benefits of the tool suites being under one joint governance structure now and into the future, recognize the value of a large, shared open-source community, and to suggest ways to improve interoperability between the suites.

The Elephant in the Room

Consultants found that, in general, those involved in ODK leadership and governance (the PMC, and a few TSC members) were acutely aware of the divergent views and tensions around the future of the tool suites while general members of the ODK Community were mostly unaware of the differing perspectives, or any tensions between the TSCs. Both the consultants and PMC members felt that providing a process to surface and openly discuss, address and, if possible, resolve these divergent views, was critical to a successful convening.



Responding to Emerging Content

Consultants spent time on both Friday and Saturday adjusting the agenda to extend opportunities for the leadership group to address and resolve the concerns about whether the tool suites should continue under one shared governance structure.

Proposed Decision-making Process

Upon reviewing the ODK Governance Proposal, consultants recognized that the decision-making model included in the draft document was likely to contribute to, and exacerbate, entrenched conflict when addressing complex issues.

The proposed use of “lazy consensus,” in which silence equals consent, does not provide an adequate process for surfacing and resolving significant concerns that may also touch on strongly held personal values. If “lazy consensus” stalled, the proposal empowered the PMC to revert to traditional “majority rules” voting, which can set up a power-struggle dynamic that undermines trust rather than supporting discovery and collaborative problem-solving.

Consultant’s pre-convening work with the PMC included an agreement to use full-consensus at the convening for decisions about the governance proposal. Consultants developed a primer on consensus for use at the convening. Due to time constraints on Friday afternoon, the consultants chose to give a verbal explanation and then walk the plenary through a consensus-based, decision-making process.

Consultants guided the full group through a brisk plenary session, which was extended in time at the request of the participants, and culminated in consensus on a governance structure by the full plenary, which included members of the PMC and both TSCs. Additionally the approved governance model adopted the use of consensus by the PMC, for future decision-making.

Observations

The consultants were impressed that despite tensions around governance issues, significant differences in communication styles and differing visions for the future of the ODK Tool Suite, the project leadership remains engaged and committed to the ODK user base and the ODK Community’s mission and values.

Participants reported enjoying the convening overall and treated each other with kindness and respect. It was a pleasure to support the ODK Community and witness their passion and commitment to improving the world by providing open source data collection tools.



APPENDIX A - Success Stories and Cool Tools Presentations

ODK / ODK-X Success Stories

- **Michael:** Supporting Ebola Vaccination in the Democratic Republic of the Congo with ODK (not to be shared publicly)
- **Caroline:** Egypt Labor Market Panel Survey with ODK-X (not to be shared publicly)
- **Aurelio:** [WHO ODK Verbal Autopsy instrument](#)
- **Ben:** [Monitoring mosquito releases and the spread of *Wolbachia* for disease prevention with ODK-X](#)
- **Florian:** [Turtle monitoring in Western Australia: all the way with ODK](#)

ODK / ODK-X Cool Tools Demos

- [eHA Aether](#) - Adam
- [iXForms/GoMobile](#) - Gareth
- [PPP, XFormTest, ODK2Stata](#) - Joe
- [odkmeta](#) - Matt
- [NEMO/ELMO](#) - Tom
- [ruODK](#) - Florian



APPENDIX B - TSC Breakout Session Summaries and Notes

How Work Gets Done Now and in the Future / ODK

Organizer(s): Yaw

Summary: Overview of current and future project funding for ODK, highlighting challenges and risks of current model.

- [Session Notes: How Work Gets Done Now and in the Future](#)
- [Session Slides](#)
- [Summary of Concept Notes](#)

Expanding the Community / ODK-X

Organizer(s): Caroline

Summary: Participants reviewed the ODK-X Roadmap prioritizing and delegating tasks related to: documentation, programming/underlying developer issues, marketing and other topics.

- [Session Notes: Expanding the Community](#)
- [Challenges and solutions spreadsheet](#)
- [ODK-X Big Picture Roadmap](#)

Longitudinal Data Collection 1 / ODK

Organizer(s): Adam, H  l  ne

Summary: Participants defined Longitudinal Data Collection and established a shared vocabulary around Entities, Entity Types, Entity Sources and Records. Participants reviewed use cases and user stories to identify unique and shared workflow issues.

- [Session Notes: Longitudinal Data Collection 1](#)

Async_assign, Sync protocol, XForms / ODK-X

Organizer(s): Waylon, Jeff, Clarice, Li

Summary:

Async_assign

- Implement async_assign in xlsx in query

Sync protocol

- Identified advantages of syncing per group
- Consider using Android features and security chips to address PII issues

XForms

- Integrate ODK tools back into the ODK-X tool suite
- Prioritize ODK / ODK-X Tool Integration

- [Session Notes: Async_assign, Sync protocol, XForms](#)



We Can Work It Out, LLC

Facilitation / Consulting

Docs Changes / ODK-X

Organizer(s): Caroline

Summary: Reviewed current docs, docs contributor guide and the github list of docs issues. Prioritized proposed changes and added to ODK-X Roadmap.

- [Session Notes: Docs Changes](#)
- [Prioritized Table Of Docs Changes](#)
- [Github list of Docs Issues](#)

Map Based Collection - 1 / ODK

Organizer(s): Dan, Ping

Summary: Discussed a variety of use cases and implementation options for requested features including, Offline address search, GeoTrace that persists from start to end of form, Better control over the buttons shown to the user in the widgets, Which map based feature will be assigned to the submission, Ability to segment/split lines when tagging data to roads, etc.

- [Session Notes: Map Based Collection 1](#)
- [ODK Collect Future Directions for Geo](#) (Google Doc)
- [ODK and OSM Google Doc](#)

Improving UX Prioritization / ODK-X

Organizer(s): Ben

Summary: Group identified and prioritized UI issues related to onboarding challenges, documentation gaps and improvements, overall experience and look of the UI including possibly creating a style guide, navigation and more user friendly error messages. High priority items were integrated into the Project Roadmap.

- [Session Notes: Improving UX Prioritization](#)
- [Onboarding Challenges and Solutions](#)
- [ODK - X Docs Changes](#)

Improving documentation 1 / ODK & ODK-X

Organizer(s): Tom, Caroline

Summary: The group reviewed current documentation tools and processes and identified both process and tool improvements. The group discussed the possibility that TSC1 and 2 will not release new features until documentation is complete.

- [Session Notes: Improving documentation 1](#)

Longitudinal data collection 2 / ODK

Organizer(s): Adam, H  l  ne

Summary: Robust discussion of design issues including entities and their relations (nested / linked), data structure's impact on performance, pros and cons of form first v. entity first models.

- [Session Notes: Longitudinal Data Collection 2](#)



We Can Work It Out, LLC

Facilitation / Consulting

Understanding How You Use Collect / ODK

Organizer(s): Callum

Summary: Session Notes are Empty

- [Session Notes: Understanding How You Use Collect](#)

Product Roadmap and Strategy / ODK

Organizer(s): Yaw, Hélène

Summary: The group discussed the ODK Roadmap, topics included: identifying need for better analytic data, considered deprecating Briefcase, the impact of changes in the Android OS, how to support / maintain Build, Briefcase and Central, the possibility of integrating Kobo FormBuilder into the ODK tool suite.

- [Session Notes: Product roadmap and strategy](#)
- [Slides - Product Roadmap and Strategy](#)

New Tools Development / ODK-X

Organizer(s): Waylon, Li, Jeff

Summary: Discussed current status / progress on Notify and Submit and generated a list of suggestions for each. Discussed deployment issues.

- [Session Notes: New Tools Development](#)

Roadmap & Resources / ODK-X

Organizer(s): Ben

Summary: Integrated decisions from prior convening sessions into a 3-month / 6-month / 12-month plan, as well as follow-up on 'New Tool Development.'

- [Session Notes: Roadmap & resources](#)
- [Onboarding Challenges and Solutions](#)
- [OKD-X Roadmap Github](#)

Pyxform Backlog Grooming / ODK

Organizer(s): Dickson

Summary: Discussed namespace for meta tags. Addressed implementation challenges for downstream users when transitioning meta tags into the meta block.

- [Session Notes Pyxform Backlog Grooming](#)
- [Github - XLSForm/PyxForm Issue 10](#)
- [Github - XLSForm/PyxForm Issue 327](#)
- [Github - XLSForm/PyxForm Issue 203](#)
- [Open Data Kit Forum: Triage Sprint for PyxForm](#)