

Need help setting up a group?

You need help or advice to set up a Samvera Interest Group or a Working Group? You've come to the right place!

If this page doesn't answer your questions and you still need help, then you might want to

- email the Samvera Community mailing list (samvera-community@googlegroups.com), or
- email the Samvera Steering Group (samvera-steering@googlegroups.com)

...but please read the relevant bits of this page first!

What's the difference between an IG and a WG?

Interest groups, as compared to working groups, are for discussion rather than developing specific deliverables. It is expected that working groups will be formed out of interest groups as requirements emerge from the conversations.

Working groups are the main working vehicle within the Samvera Community and may stand alone or be born out of existing Working Groups or Interest Groups. They are created to perform specific tasks in a defined realm and timescale, thereby allowing collaborative work to flourish in a structured environment.

How do I start?

Interest Groups

Interest groups can be formed at will. A lightweight statement of the topic, the scope and objectives of discussion of the interest group should be documented in the wiki [using the standard template](#), and at least one channel for communication noted. Interest groups do not need to be approved, but should not be formed without some level of need within the community.

At least three organizations must be represented in an interest group. Anyone may be part of an interest group with or without a Contributor License Agreement, as there are no deliverables from the group.

All of the discussions of the interest group should be transparent and public and the channels used for communication must be published, but there may be situations where either the discussion takes place offline or is not suitable for public dissemination.

Working Groups

Working Group Formation

Working groups should be able to be convened with a minimum of effort, while allowing participants to understand what they are signing up for. The group should emerge naturally from discussions and needs within the community, while not penalizing individuals or organizations that were not part of those initial discussions. Using existing channels, such as interest groups, participants in discussions that show promise of inter-institutional convergence and the possibility of joint development work should document the shared needs and requirements. This documentation should be more persistent and visible than an email thread, but need not be overly formal. The preferred method is a maintained page within the Samvera wiki [using the template provided there](#), otherwise a publicly shared document linked from the wiki is sufficient.

The documentation process should result in a common understanding of:

1. The overall domain into which the discussion falls
2. The shared needs and requirements within that domain
3. Use cases that demonstrate these needs and requirements
4. A path towards one or more products that would meet the requirements
5. The organizations willing to commit resources towards realizing the product(s)
6. The timeframe in which the product(s) are needed and should be possible

This document, henceforth the charter, provides the definition of the working group and its deliverables. It is not a contract and may be changed with the consensus of the members of the working group at any time, however significant changes such as a 6 month or more delay in timeframes, the abandonment of a deliverable, or the change in the overall scope of the work should be announced to the Samvera Community via the regular channels.

Working Group Approval

Once the draft charter is acceptable to the participants in the discussion, there is a Call for Participation (CfP) issued. This is simply an email to the appropriate lists with at least [CfP] in the subject heading that announces the document and seeks the engagement of the additional participants. Organizations must respond publicly that they are willing to take part and commit development resources towards the working group's goals. At least three Partners must respond positively, and no more than three Partners may respond negatively, for the working group to be approved. If fewer than three Partners are willing to contribute, then the working group's topic is likely too specific and the work should be done outside of the Working Group process. If more than three Partners object to the work being done, then there is a significant issue that should be resolved before committing resources.

At least two calendar weeks must pass between the CfP and the working group being approved. If there are only one or two Partners interested after four calendar weeks, then the CfP is ended and the charter should be discussed and modified before re-announcing.

Once the working group is approved, the link to the charter will be added to the Hydra Wiki page that lists active working groups.

Working Group Requirements

All members of a working group producing code must be licensed Samvera contributors covered by the appropriate CLAs, otherwise members must agree that textual materials may be released under a Creative Commons Attribution 4.0 International License. This is to ensure that the deliverables of the group are unencumbered by intellectual property restrictions. Participants meeting these requirements may join at any time, without any prior approval process: the gateway is activity, not reputation.

All discussion within the working group must be transparent. This means that meetings must have notes taken about the attendance and any decisions or action items, general discussions take place on mailing lists maintained by the community, IRC logs should be posted and so forth. Any meetings, face-to-face or teleconference, at which decisions are made must be announced in advance and open to any working group participant, otherwise any opinions expressed at the meeting must also be discussed on a mailing list. Meeting times should be published far enough in advance to allow members to schedule their participation, and preferably use a consistent schedule. The Partner institutions are responsible for ensuring the transparency of the discussion, but every participant is encouraged to take an active role in this regard.

Working groups must remain active. Any working group that does not respond to comments, questions or concerns either from participants or the community will be removed from the list of active working groups in the wiki.

Working groups must strive to meet their timelines and produce the deliverables designated in their charter.

The working group must always have at least one participant designated as Facilitator. Facilitators are responsible for promoting continued activity within the group. The Partner institutions are responsible for ensuring there is active facilitation, however the Facilitator is not required to be from a Partner. Facilitators have no additional powers or rights than any other participant.

Working groups may self-organize in the most convenient manner to accomplish their tasks, including creation and assignment of additional roles and responsibilities as appropriate. Sub groups may be formed and disbanded at will, consisting only of members of the Working Group. They do not need to separately meet the requirements of the Working Group, such as having their own Facilitator or Partner members.