Activity: Human Resources Required

Goal

Identify the human resources required to support program goals and strategies

Prerequisites

This activity will work best if your program already has a business or strategic plan, community engagement plan, or technical roadmap, and has determined that it is time to add new members to the program team.

Who Should Participate?

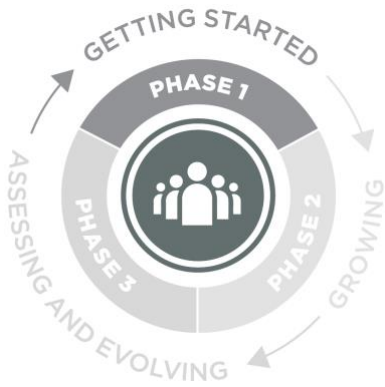Program leadership (strategic thinkers), Program management (tactical thinkers)

Length

90 minutes

Activity Instructions

For shared reference, list the top-level elements from your strategic/business plan, community engagement plan, or technical roadmap on a physical or virtual whiteboard.

1. As a group, discuss and capture some or all of the following questions. You may add additional questions depending on your program's situation. Designate a facilitator to help guide the conversation.

   o Why do we want to add additional members to the team? Will it:

      ▪ Help further our program's mission/vision?

      ▪ Help our stakeholders achieve their goals?

      ▪ Improve our sustainability along one or more facets?

      ▪ Increase program capacity alone one or more facets?

   o What do we think we can accomplish by adding additional team members?

   o Are there other ways to achieve the impact we are looking for without adding to our headcount?

2. As a group, read through the list of potential positions below (page 3) for brief position descriptions for common roles held on OSS programs.

3. Provide the group with 5-10 minutes of individual reflection time to read through each position description.

   o If a position on the list already exists on the program team, you may remove it from the list.

   o You are free to add additional positions to the list depending on the specifics of your program; for example, if your subject matter is very specialized, you may wish to add a subject matter expert to the list.

4. Write out the position titles on a physical or virtual whiteboard.

5. Ask all participants to place the numbers 1, 2, and 3 next to the position names they would choose as their next hire (e.g., place #1 next to the role to be hired first, #2 next to the second, etc.).
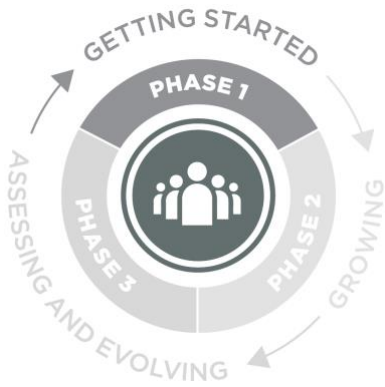
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- o Participants should base their rankings on their understanding of the strategic/business plan, technical roadmap, communications plan, and results of the discussion held at the beginning of the activity.

6. Review the results and take 15 minutes to discuss and capture some or all of the following questions. You may add additional questions depending on your program's situation.

- o Is there consensus? Did participants generally agree on the top two?

- o If there is an outlier, ask the participant to explain his/her reasoning.

- o How would the top two choices benefit the program?

- o Did any roles receive no votes? What do we lose by not adding those roles yet?

7. If you do not have consensus on the top two roles to add, use the Gradients of Agreement to assist.

- o The Gradients of Agreement chart below (page 5) may help your group achieve consensus. Instructions for the Gradients of Agreement are provided with the chart below.

- o Example proposals for this activity might be: "Our next hire should be a software engineer," or "Our next hire should not be a program manager."

8. When you are ready, continue on to *Resources Activity: Value Propositions for Job Descriptions* to move forward with the job search.

RESOURCES

Phase I: Creating Consistency

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Position Overviews

The list below includes roles that are often hired in an OSS program's lifecycle. Feel free to remove roles from the list that are already filled, add new ones to the list if your program has more specific needs, or combine roles.

Director / Executive Director / Managing Director

- Provide strategic leadership for the program

- Manage financial and business affairs

- Grow networks of stakeholders, contributors, members, and/or funders

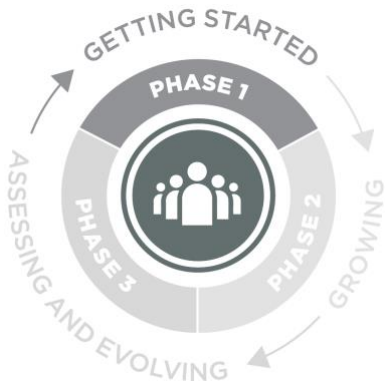Project Manager / Program Manager

- Provide general program oversight

- Liaise between governance / leadership and program staff

- Build communication and outreach plans

- Monitor and manage budgets

Product Owner / Functional Lead

- Manage and prioritize product backlog

- Understand user needs and priorities

- Define user stories, sprints, and acceptance criteria

- Liaise between developers and program manager / users / governance

Technical Lead

- Provide open-source development leadership

- Work with program leadership to develop and support the project technical roadmap

- Grow the developer / technical contributor community

- Develop documentation and training

- Assist community with implementations

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Community Manager

- Supports and manages the activities of the program's community

- Build and execute communication, outreach, and advocacy plans

- Liaise with operational groups to ensure consistency across the program

- Provide user support and training

Quality Assurance Lead

- Oversees testing of software features as part of a collaborative team

- Develop test plans

- Create risk mitigation strategies

- Liaise with operational groups to improve QA process

Software Engineer

- Develop and implement feature enhancements, bug fixes, and/or plugins identified and prioritized by the community

- Write and maintain accessibility and unit test suites

- Help identify, prepare, and review community code contributions

- Provide technical expertise for QA, documentation, and implementation
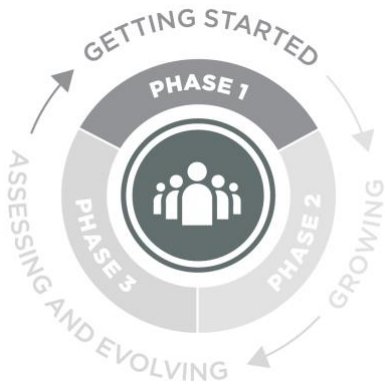
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GRADIENTS OF AGREEMENT

1	Endorsement	
2	Endorsement with minor point of contention	
3	Agreement with reservations	
4	Abstain	
5	Stand aside	
6	Formal disagreement, willing to go with majority	
7	Formal disagreement, desolved of responsibility	
8	Block/veto	

Tally votes
in each box

To use the Gradients of Agreement chart:

- Record the proposal being used (e.g. on a flipchart or virtual whiteboard/document)
- Confirm that everyone understands the proposal, and make any necessary changes
- Read through the gradient definitions, from Endorsement to Veto
- Poll the participants to see where everyone stands. Note that the results show the level of support for a proposal, final decisions will take the results into account but are not based solely on the poll