Governance in the Open Organization
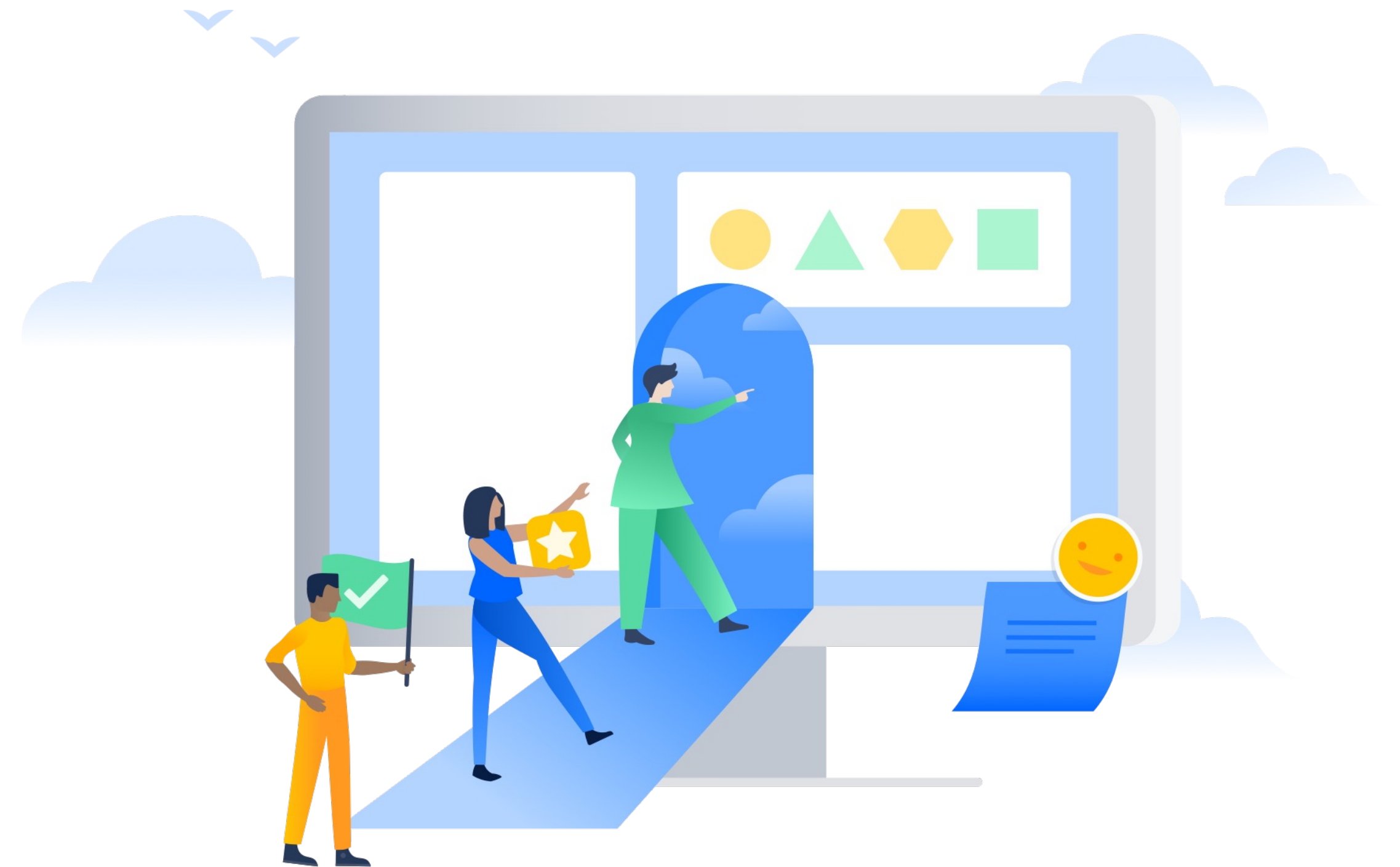
How to Politely (but firmly) Run a Governing Body in an Open Organization

JAY GREGUSKE | RED HAT'S PORTFOLIO PROCESS DESIGNER

Red Hat has an *internal community* for Jira standards.

A little bit about

issues.redhat.com

issues.redhat.com

Instance

Governance

Advancement

4 Jira Server Instances → 1 Data Center

15,500+ Users

~860 Projects Standardized

All sold products represented

8+15 admins

Public!

issues.redhat.com

Instance

Governance

Advancement

🌐 Community defined standards

🪄 Executive Sponsorship but no mandates
mandates

📅 Operating for 3
years

📋 Rubrics for introducing new standards
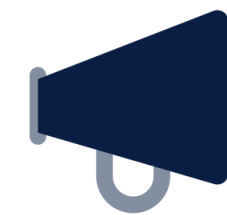
👥 ~8,000 associates represented

✅ Clear voting rules

issues.redhat.com

Instance

Governance

Advancement

Increased associates' influence

Expanded associates' visibility

Accelerated associates' development

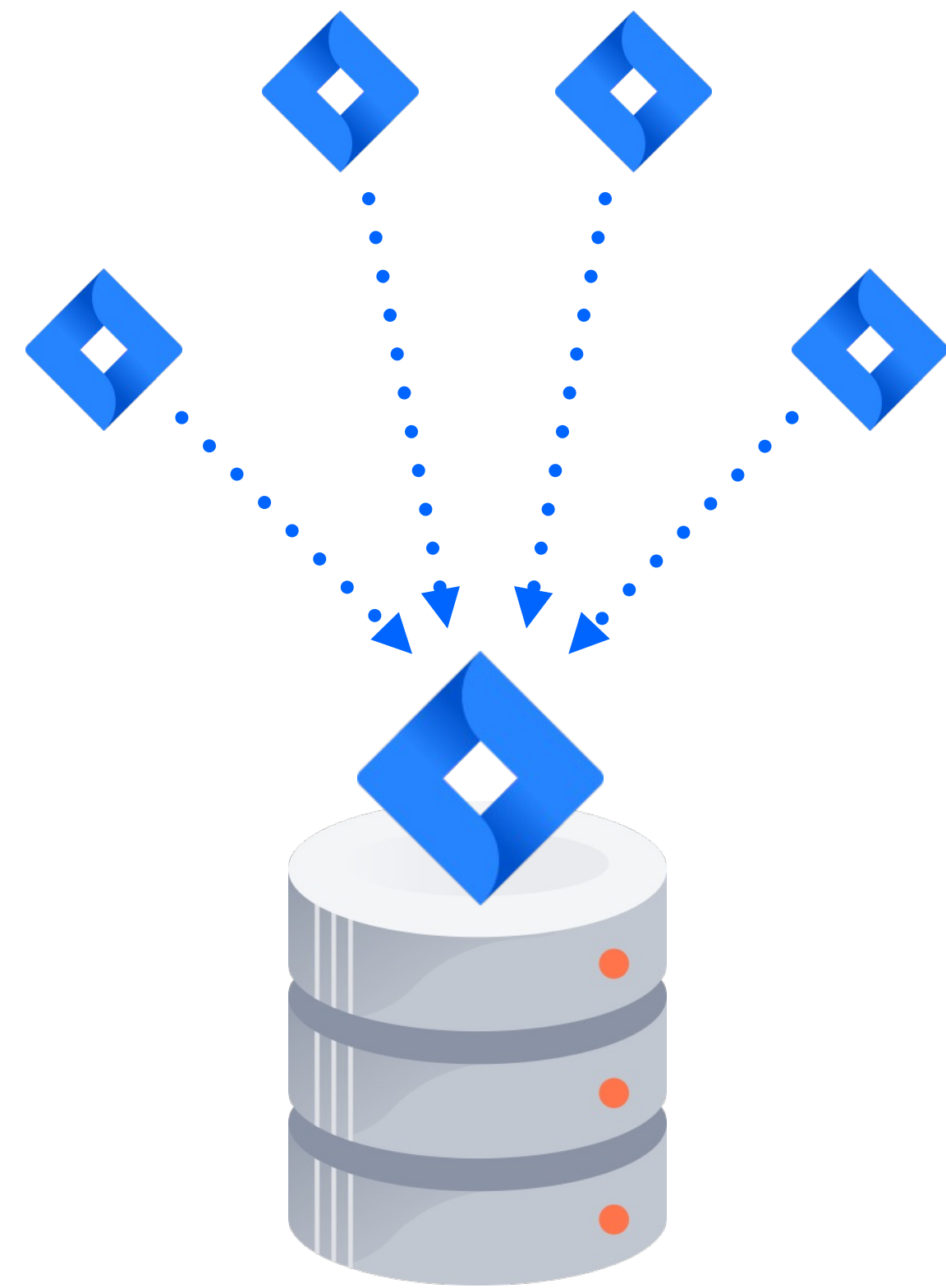# Open Organizations

Transparent

Inclusive

Adaptable

Collaborative

Communal

Origins

RELICS FROM LONG AGO

DATA CENTER

Everyone knew we had to consolidate, but it was nobody's problem.

"I'm glad that's not my problem"

-- A lot of people

FIND THAT PASSION, AND SET IT UP TO SUCCEED.

Pivoting a working group

Share Leadership

Show them another way of working, and share the responsibility for the outcome
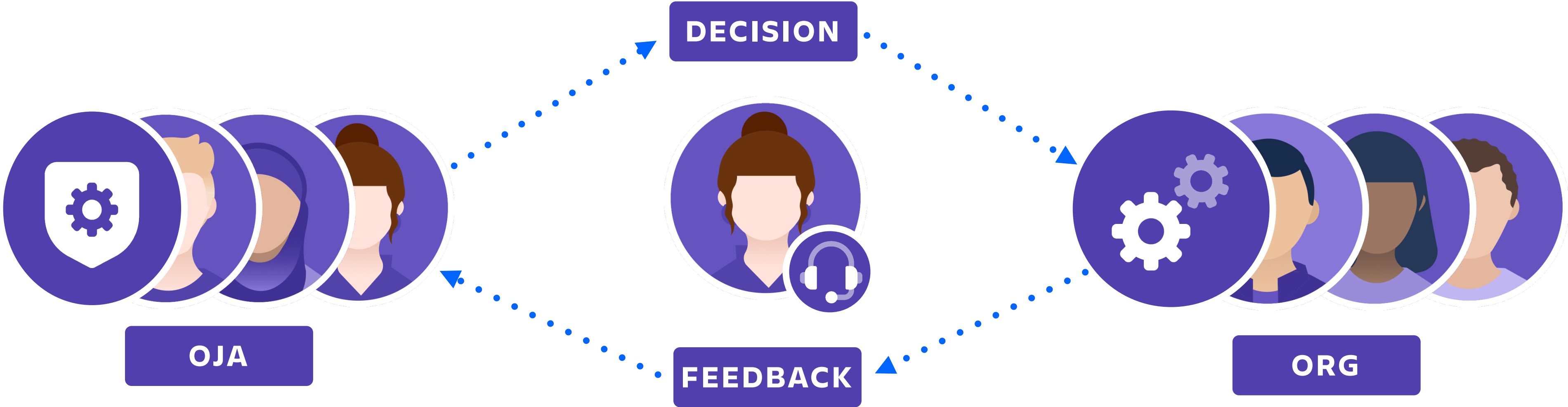

Prep in Advance

Brainstorm reactions and a thorough agenda

Present An Action Movie

Glue them to your shared screen

COMMUNICATION MODEL

DECISION

FEEDBACK

OJA

ORG

Decision Models

Benevolent Dictator
Fast but risky with weak scaling

Democracy
Scalable but slower and prone to deadlocks

THE GOOD

Progress made already

Members know each other

Interest and passion

THE BAD

Group
Anemic output
Met monthly

Members
Lacked visibility
Lacked confidence
Represented too much/little
Had no time available
Lacked leadership or influence

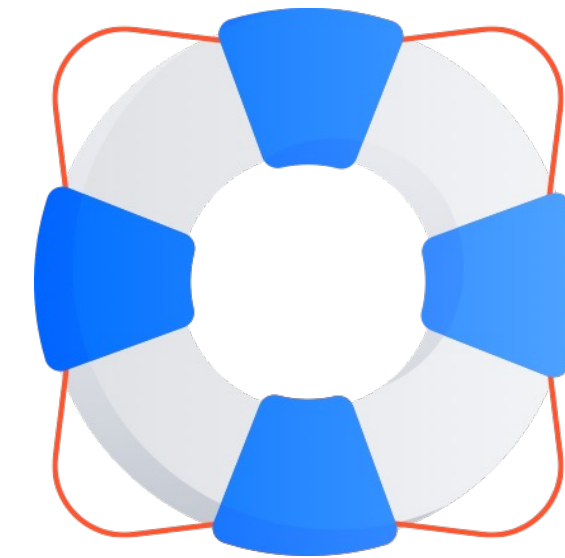# Building The Foundation

Roles

Representatives

People with voting power
and skin in the game.

Consultants

Knowledgeable assistants
with insightful opinions.

Pivoting people

Unique Challenges

Every person has a unique mindset and position.

Establish that Trust

Get them comfortable with you as a leader.

Uplift Them

Find their reservations and discuss how to address them.
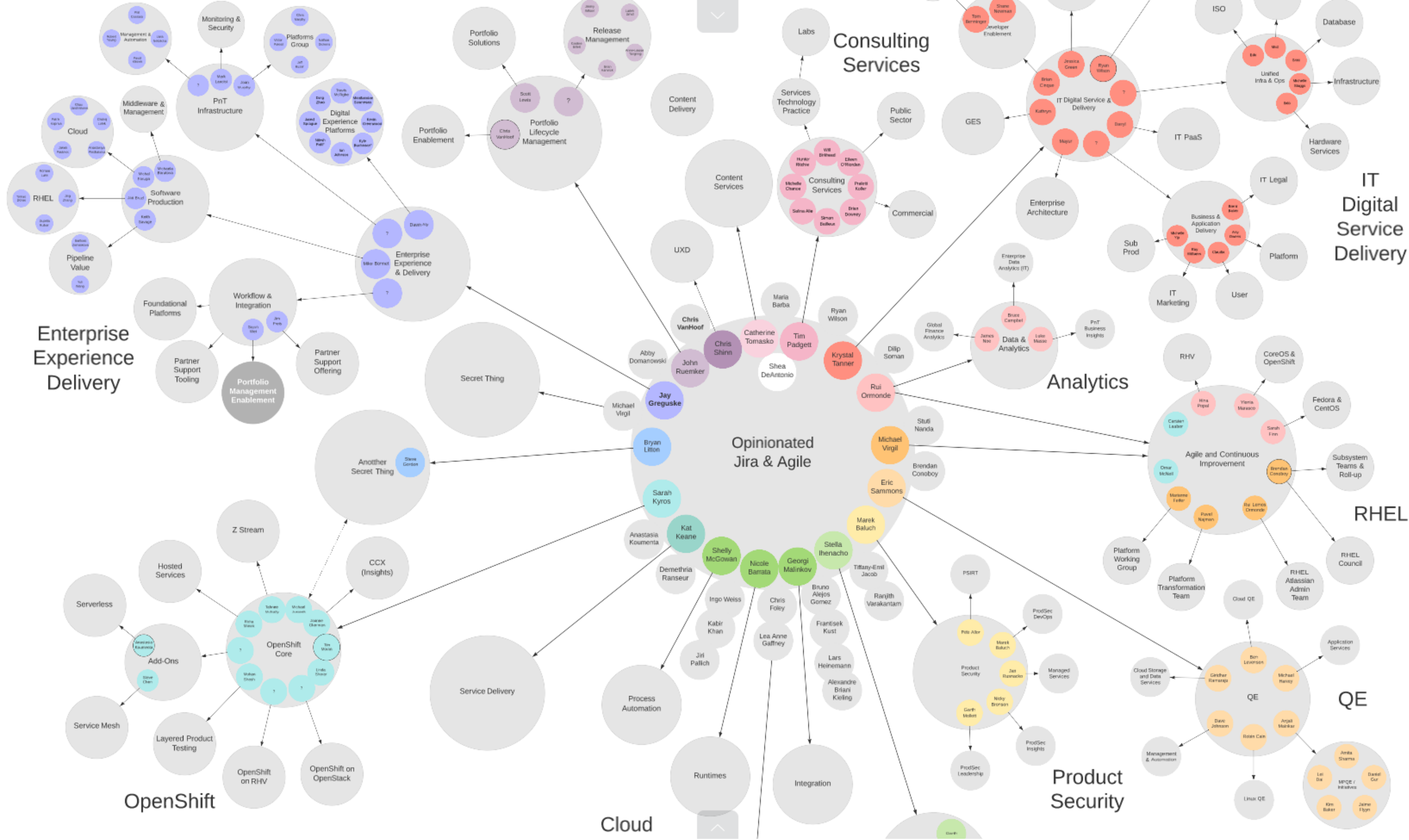
Build Relationship s

Make them comfortable.

- You will have a lot of 1:1s in the beginning
- During conflict, identify the passionate participants, then delegate to a separate call to work it out

Break the ice regularly.

- Introduce a 5 minute start or break in the meeting
- Share unrelated feats, activities, hobbies, or accomplishments
- Let it be organic, not a company-mandated thing

Team capability will vary.

OJA Rubrics

New Issue Type

New Issue Type Scheme

New Status

Workflows

Does this issue type represent a dramatically different type of work that requires its own workflow? Since workflows are issue type specific, there is no way to create a different path for work to flow through without introducing a new issue type, and this can be a valid reason for an addition.

Fields

Will the information stored on this issue type be different from the information being collected on current types?

Reporting

Does this concept represent something that we want to report on uniformly (for example, defects)?

Standards Conflicts

Does this issue type align with best practices in the industry, or conflict with them? Are there any conflicts with terminology already used within Jira?

Internal Conflicts

Is the new proposed issue type in conflict with common terminology used within Red Hat that will cause confusion if used within Jira?

Momentum

Simply put, what is the cost of introducing this change? If there are conflicts with its usage, how entrenched are they, and how much effort will be required for retraining and socialization to avoid miscommunications?

Appropriate Tier

The hierarchy tier of issue types is an instance-wide setting. Therefore, a new issue type must fit in the hierarchy where the majority of the user base would expect it to be (i.e. a team-level work item should not be a peer of a Feature, which is usually program-wide).

OJA Rubrics

New Issue Type

New Issue Type Scheme

New Status

Product Development Must use BU Priorities and Features

If the requesting team works on a Red Hat product or service, and they are tracking strategic work in their project(s), then they must use Features and Market Problems to track their larger work efforts. Those issue types must be included in their scheme because Red Hat has standardized on those Pragmatic Marketing terms for product development.

Use Approved Issue Types Only

New issue type schemes must only use approved issue types in the Red Hat Standards. If a request expects a new issue type, they must get that approved first. Any subset of issue types is permissible, even pairing up Market Problems with Themes.

Distinct Purpose

The issue type scheme should be distinct from the others in terms of purpose. Why does the requesting team need a unique combination of issue types? What is special about them to require that?

OJA Rubrics

New Issue
Type

New Issue
Type Scheme

New Status

Use Generic Names

Generic names make it easier to re use statuses across workflows. Reusing statuses aids in cross project communication. Departmental names must not be in a status name. Departments can change names over the course of a re-org. Roles or business functions in status names, such as "Documentation Review" are generally discouraged but there are exceptions for workflows or teams that have multiple review stages. Product names should not be in status names either.

Lastly, numbers must not be present in status names. A sequence should be implied by their definitions, and including numbers in a status name makes reusing that status awkward in workflows that do not include every other numbered status.

Renames deserve special mention. Sometimes a request for a new status is really just a rename because the requester prefers a different word to describe the status. Today, requests to rename are almost always rejected for the following reasons:

- They duplicate a concept or definition of another status, thus should not be provided in parallel.

- Renaming a status impacts existing filters, boards, and dashboards that refer to the old status name. The Jira maintenance team at this time does not have an efficient, reliable way to change these things instance-wide to make sure reporting lines up after a status rename. The same is true for custom field renames.

- Status renames are generally expensive operations, and the benefit rarely outweighs the cost. The requesting team will be happy, but the existing users of the current status name will be disrupted.

No Duplication

There are many ways to express the same concepts; we should agree to express them the same way. The obvious thing to consider is whether the status means the same thing as another status but uses different words in the name. The stage a status represents must not be duplicated too. Put another way, verify that a new status request actually has a unique and distinct definition associated with it.

Furthermore, some concepts should not be duplicated in other fields. Below are some common requests that are a bad practice.

[...]

Spreading the Word

Pitch Deck

Part recruitment tool and part FAQ

Find Forums

What is adjacent to, impacted by, or related to your governing body?

Present an Action Movie

Getting engagement is harder than getting attention. Keep it interesting!

Full Operation

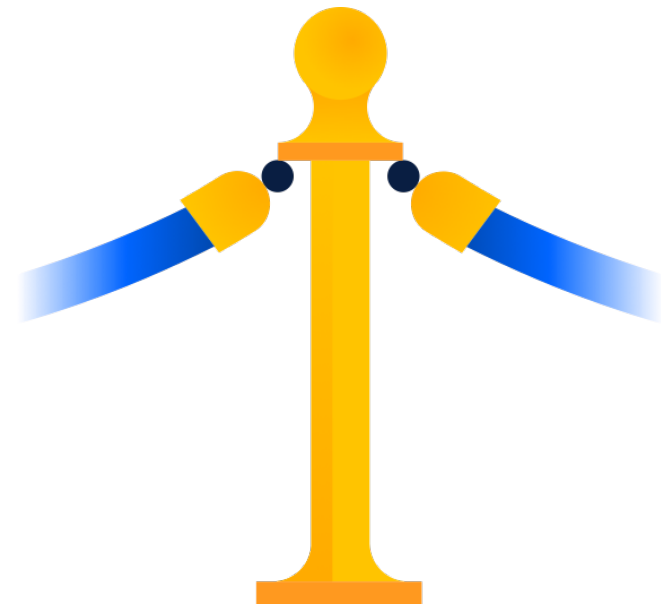# Setting a Community Mindset I
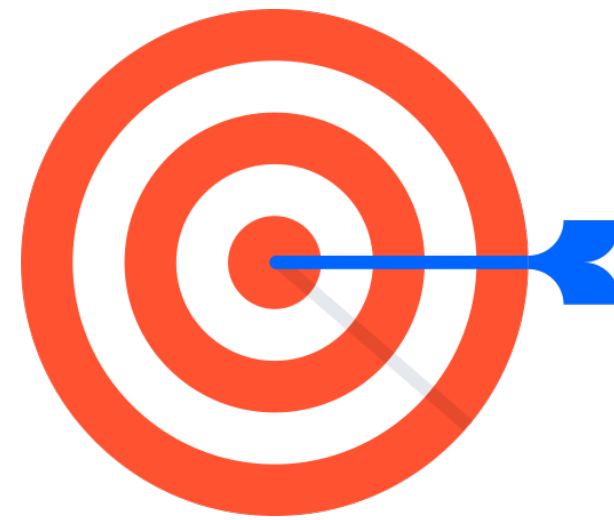
No Ivory Towers

Meet Where They Are

Exceptions Can Exist

Setting a Community Mindset II
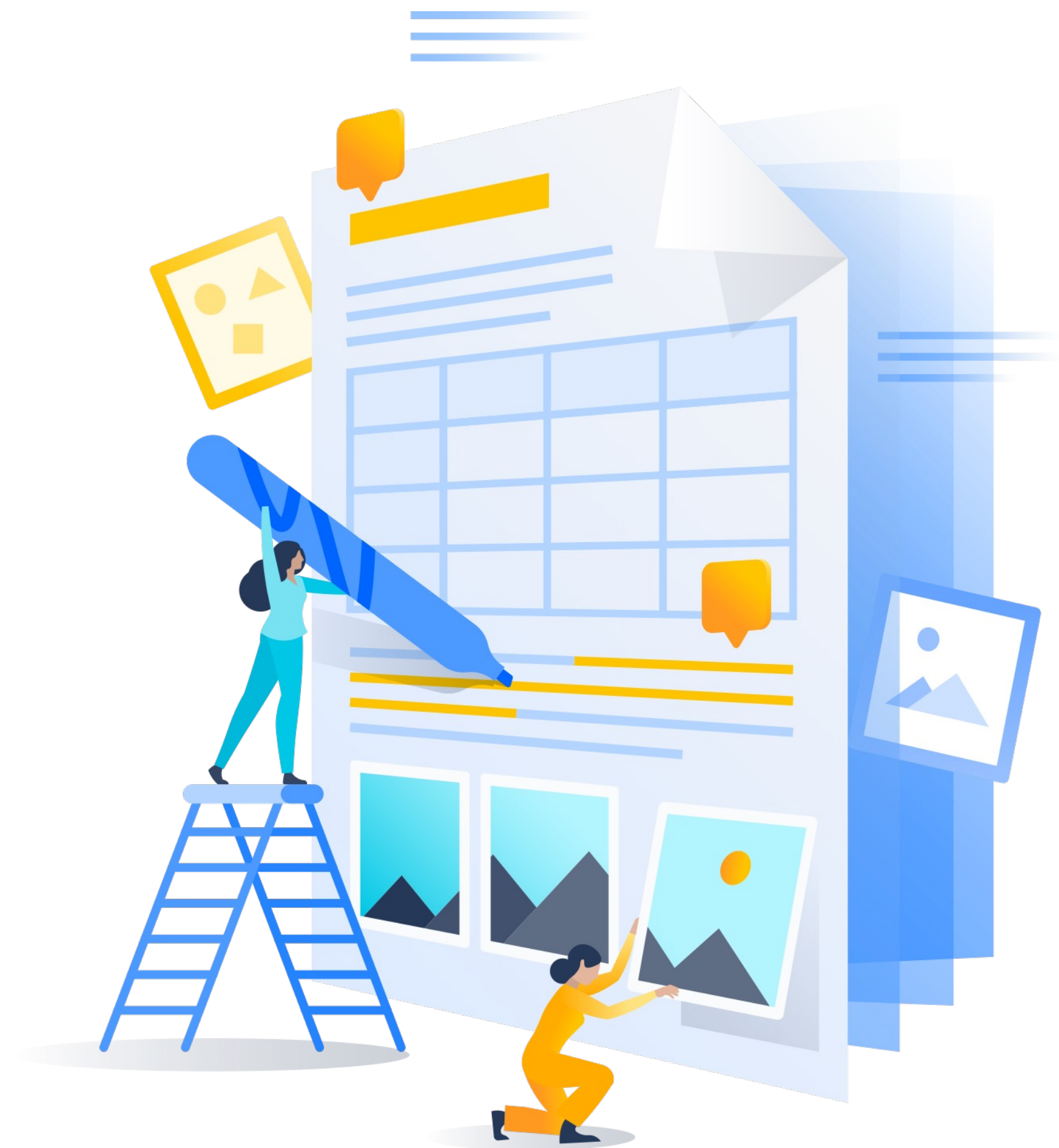
Iterate on Procedure

Green Fields First

Move That Needle

Do not fight every battle.

Prioritize What Matters

... and ratify that with your community.

GUIDELINES

There are lines that should not be crossed

For softer lines, consider temporary arrangements

Consider "momentum" of a request or change

SUPPORT SPECTRUM

Promoted

Recommended

Accepted

Tolerated

Marginalized

Rejected

Organizational Approach

Standards

Monthly review of new requests for approval.

Core

Execution work following an approval.

Summary

1. Find passionate people
Pivot a working group, or start your own with clear goals and deliverables.

2. Build a Foundation
Create roles, a decision model, and an influence map to uplift members.

3. Grow Your Community
No ivory towers, meet requesters where they are, welcome feedback.

4. Pivot Toward Execution
Focus on the needle, don't fight every battle, and prioritize what matters.

Thank you!

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