



# Samvera Code of Conduct Review - Update

October 2020



**April 2020**

CoC Working Group recommendations to Partners to seek a 3rd party consultant.

**May 2020**

Proposal and quote from Otter Tech.

**June 2020**

Checked references.

**July 2020**

Greenlight to proceed.



“ *This is great news! Thank you for taking this to your sponsors. I'm excited to take on the Samvera community as a client.*

- *Sage Sharp, Otter Tech CEO. July 29, 2020*



# To Do What?

## PROCEDURES REVIEW

“Otter Tech offers a review of event or online community Code of Conduct procedures. We will work with you to document how your enforcement team evaluates reports, documents responses, and follows up with reported people. We will work together to define a plan to communicate the importance of the Code of Conduct and build community trust in reporting incidents.”

**\$5,000**

## INCIDENT RESPONSE WORKSHOP

“Otter Tech offers a four-hour workshop on Code of Conduct incident response (for Community Helpers). The online workshop is facilitated through a group Zoom video. The workshop uses role-play to help enforcement team members to practice calm and firm responses to Code of Conduct incident reports.”

**\$3,500 (max 14 participants)**



# The approved plan

## **Engage Otter Tech**

Hire Sage Sharp, CEO, to lead our revision of the Code of Conduct and to teach the workshop.

## **Create working group**

Based on Otter Tech's recommendations, assemble a group to do this work directly with Sage.

## **Establish plan and timeline**

To guide the work and to keep the community informed about nature of the work and changes on the horizon.



# Engage with Otter Tech

- **Status: Almost ready to start**
- Original plans:
  - Receive contract week of Oct 5
  - Begin work on Oct 15
  - Attend a bit of Connect 2020
- Need to reset the plans with Sage

Oregon wildfires in  
Aug/Sept were disruptive



# Create a Working Group

- **Status: Ready to Start**
- Jon Cameron, Indiana Univ
- Jeremy Friesen, Notre Dame
- Jessica Hilt, UC San Diego
- Nabeela Jaffer, Univ of Michigan
- Robin Ruggaber, Univ of Virginia  
(Steering liaison)

Thank you for stepping up!



# Establish a plan & timeline

- **Status: Not ready to start**
  - Depends on signed contract with Otter Tech
- Expected to take 4-6 months
- Plan shaped by Otter Tech's process
  - Guiding questions
  - Scope of CoC
  - Etc.



# Questions





## Links

- Code of Conduct Working Group [Recommendations](#).
- Otter Tech quote for [procedures review](#).
- Otter Tech quote for [workshop](#).
- Reference Check [notes](#).
  
- Presentation template by [SlidesCarnival](#)