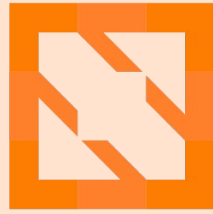




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# The Maintainer's Toolkit: Must-know CNCF Resources for Project Owners



*TAG Contributor Strategy*

**Dawn Foster**, VMware

**Catherine Paganini**, Buoyant





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Europe 2022

on  
2021



## Dawn Foster

Director of Open Source Community Strategy @ VMware

Co-chair of TAG Contributor Strategy

🐦 @geekygirldawn



## Catherine Paganini

Head of Marketing & Community @ Buoyant (Linkerd)

Maintainer CNCF Cloud Native Glossary

TAG Contributor Strategy

🐦 @CathPaga





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# Why do we need a toolkit?

We know how to code and  
develop great docs.



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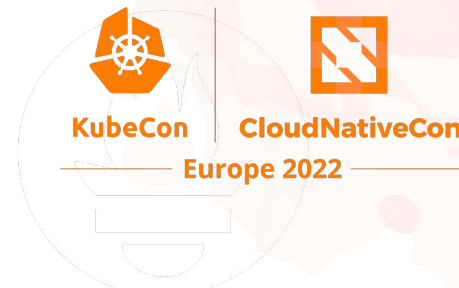
# There is so much more to an open source project than code and docs...







Learn more at [cncf.io/contributor-strategy](https://cncf.io/contributor-strategy)



# There is a LOT to it!

Mentoring

Deciding  
governance

Ensuring  
fairness

Cultivating &  
promoting  
leaders

Cultivating  
users

Community  
Meetings

Contributor  
guide

Marketing  
your project

Contributor  
recruitment

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# Enter TAG Contributor Strategy



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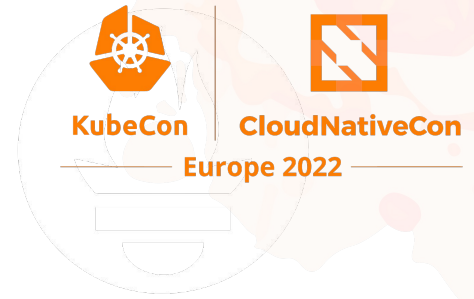


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# Why should you join?



- Connect with CNCF projects to **exchange ideas**
- **Learn** from one another
- Build a **thriving ecosystem** of successful open-source projects

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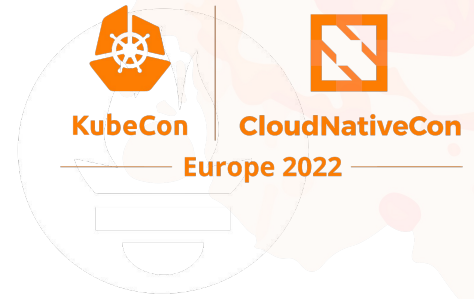
*We set out to reform the governance structure for Vitess in late 2021. TAG-Contributor Strategy was of great help to us by steering us towards a standard structure, and reviewing the draft proposal before it was put out for public comment.*

Deepthi Sigireddi, **Vitesse Project Maintainer**



# How can the TAG Contributor Strategy Help?

- CNCF Maintainer's Circle
- Informational and **training** resources
- **Guidance** for maintainers about **how to engage** with contributors



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Learn more at [cncf.io/contributor-strategy](https://cncf.io/contributor-strategy)

# Contribute.cncf.io



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Project Guidance

GitHub

Tips for managing your GitHub repositories

Community

Tips for managing your project's community

Governance

Define an open governance model

Feedback

Was this page helpful?

Yes

No

Last modified November 6, 2020: [Create website for maintainers and contributors](#)

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Search this site...

I want to be or am a maintainer

I want to be or am a contributor

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# Community | [contribute.cncf.io](https://contribute.cncf.io)

## Community

- Community CRM Runbook
- Project Health
- Contributor Growth Framework

The screenshot shows the 'CNCF CONTRIBUTORS' website. The left sidebar contains a navigation menu with the following items: Maintainers, GitHub, Community (highlighted with a green border), Community CRM Runbook, Project Health, Contributor Growth (highlighted with a green border), Motivation, PR Workflow, Engagement, Incentivizing Contributors, Non-Code Contributors, Long-term Contributors, and Governance. The main content area is titled 'Contributor Growth' and contains the following text:

**Contributor Growth**

A framework to help open source projects develop workflows, processes, and habits that incentivize users to become long-term, active, and engaged members of your community.

The goal of this framework is to help open source projects develop workflows, processes, and habits that incentivize users to become long-term, active, and engaged members of your community.

The first version of this document summarizes the experience different project maintainers have gathered over the past years (chronologically ordered by interview):

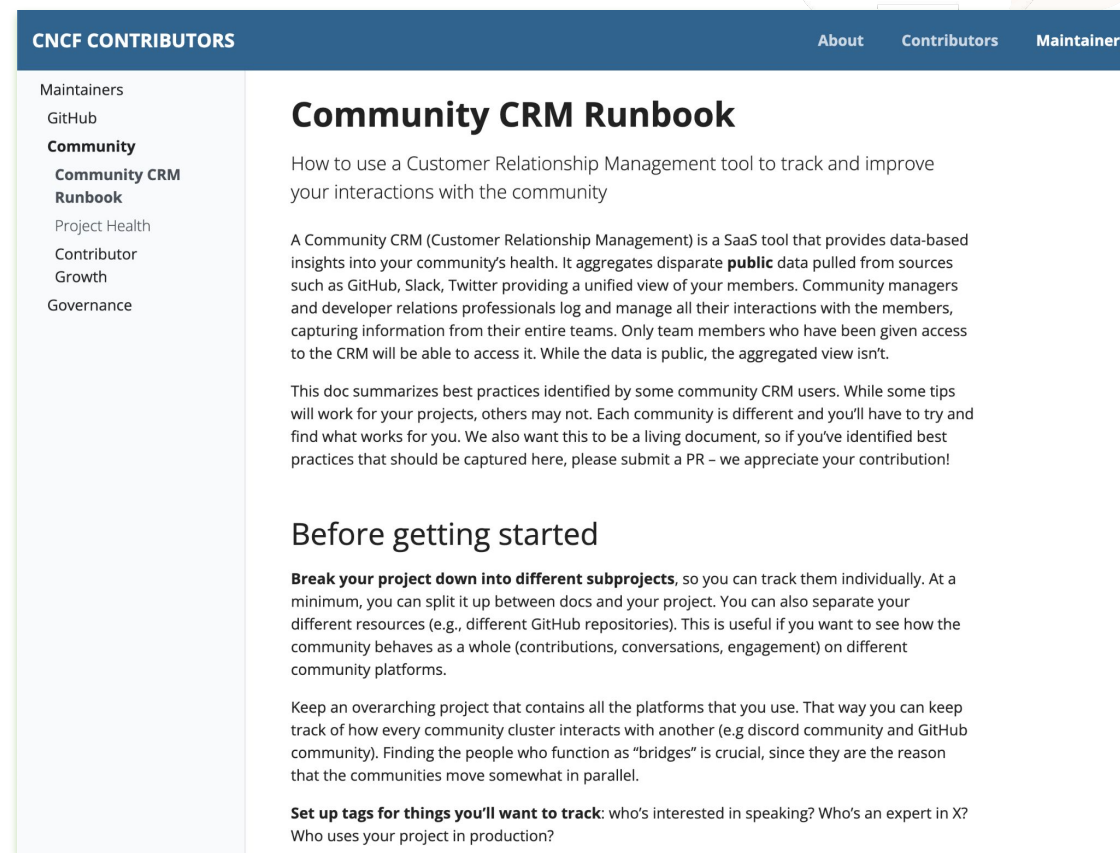
- [Paris Pittman](#) (Kubernetes maintainer, Apple)
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- [Aaron Schlesinger](#) (KEDA-HTTP maintainer, Microsoft)
- [Stephen Augustus](#) (Kubernetes maintainer, Cisco)
- [Charles Pretzer](#) (Linkerd maintainer, Buoyant)
- [Phil Estes](#) (containerd maintainer, AWS)

 [contribute.cncf.io/maintainers/community](https://contribute.cncf.io/maintainers/community)



# Community CRM Runbook

- What is it?
- How to organize your project
- Keeping track of key community members
- Keeping a history of interactions



The screenshot shows the 'CNCf CONTRIBUTORS' page with a sidebar menu. The 'Community CRM Runbook' is highlighted in the sidebar. The main content area contains the title 'Community CRM Runbook', a brief description of its purpose, a detailed paragraph about what a Community CRM is, a section on best practices, and a 'Before getting started' section with advice on project organization and tracking.

**CNCf CONTRIBUTORS** About Contributors Maintainers

Maintainers  
GitHub  
**Community**  
**Community CRM Runbook**  
Project Health  
Contributor Growth  
Governance

## Community CRM Runbook

How to use a Customer Relationship Management tool to track and improve your interactions with the community

A Community CRM (Customer Relationship Management) is a SaaS tool that provides data-based insights into your community's health. It aggregates disparate **public** data pulled from sources such as GitHub, Slack, Twitter providing a unified view of your members. Community managers and developer relations professionals log and manage all their interactions with the members, capturing information from their entire teams. Only team members who have been given access to the CRM will be able to access it. While the data is public, the aggregated view isn't.

This doc summarizes best practices identified by some community CRM users. While some tips will work for your projects, others may not. Each community is different and you'll have to try and find what works for you. We also want this to be a living document, so if you've identified best practices that should be captured here, please submit a PR – we appreciate your contribution!

### Before getting started

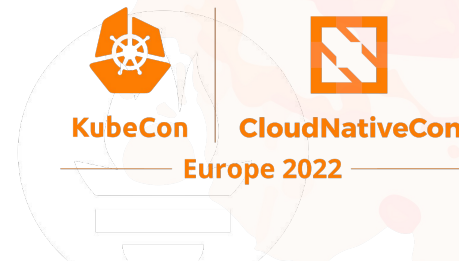
**Break your project down into different subprojects**, so you can track them individually. At a minimum, you can split it up between docs and your project. You can also separate your different resources (e.g., different GitHub repositories). This is useful if you want to see how the community behaves as a whole (contributions, conversations, engagement) on different community platforms.

Keep an overarching project that contains all the platforms that you use. That way you can keep track of how every community cluster interacts with another (e.g discord community and GitHub community). Finding the people who function as "bridges" is crucial, since they are the reason that the communities move somewhat in parallel.

**Set up tags for things you'll want to track:** who's interested in speaking? Who's an expert in X? Who uses your project in production?

 [contribute.cncf.io/maintainers/community/crm-runbook](https://contribute.cncf.io/maintainers/community/crm-runbook)





# Project Health Measurement

- How does a healthy project look like?
- How do you measure health?
- How does what you do impact health?

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GitHub

**Community**

Community CRM

Runbook

**Project Health**

Contributor Growth

Governance

## Project Health Measurement

How to measure your project's health.

While popularity measurements, like stars / forks, might be interesting, they don't provide much real insight into project health. We encourage projects to focus on metrics that help us understand which specific aspects of a project are healthy so that we can make improvements in any areas that are not.

What makes this challenging is that every project is a little different, and interpretation of the metrics will vary based on the project. For example, the thresholds of what is "healthy" for a very large project, like Kubernetes, might not be the same as what you would use for a smaller project. The measurements in this guide are not one size fits all measurements, but instead are designed to help you think about how to apply some metrics as a way to improve the health of your project. Also keep in mind that data and metrics dashboards (including DevStats) aren't going to be perfect; you will find inconsistencies and inaccuracies, so you'll always want to apply a bit of common sense and a reality filter based on your knowledge of the project.

CNCF does not specify a one size fits all measurement for project health. Instead, CNCF requires that a project specify explicitly how they measure project health, and they provide [DevStats dashboards](#) with some metrics that can be used to help measure project health.

### Measurements of Project Health

The DevStats dashboards can be overwhelming, especially for people who aren't familiar with them, so we recommend picking a small number of metrics as your focus and providing those in an easy to consume way that any member of your project can understand.

Here are a few examples of what you might want to measure to determine project health. These do not include everything that you might want to measure or every option for each metric, so think of this as a starting point. In many cases, we've included links to DevStats dashboards for various projects to serve as an example of the type of metric you might use, but you will want to go to the DevStats dashboard (or other data sources) for your specific project to see how well your project is performing for any given metric.



[contribute.cncf.io/maintainers/community/project-health](https://contribute.cncf.io/maintainers/community/project-health)



# Contributor Growth

- Tips from project maintainers
- How to motivate contributors
- Incentivize them to do more
- Encourage non-code contributions

**CNCF CONTRIBUTORS**

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GitHub

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Community CRM

Runbook

Project Health

**Contributor Growth**

Motivation

PR Workflow

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Non-Code Contributors

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## Contributor Growth

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- [Stephen Augustus](#) (Kubernetes maintainer, Cisco)
- [Charles Pretzer](#) (Linkerd maintainer, Buoyant)
- [Phil Estes](#) (containerd maintainer, AWS)

**NOTE:** We want this to be a living document where projects keep updating and adding new ideas as their experience grows. If you've learned something other projects can benefit from, please submit a PR with your advice.



[contribute.cncf.io/maintainers/community/contributor-growth-framework](https://contribute.cncf.io/maintainers/community/contributor-growth-framework)

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# Contribute.cncf.io: Governance

Overview

Charter

Leadership Selection

Image by [the CNCF](#) CC BY-NC 2.0



[contribute.cncf.io/maintainers/governance](https://contribute.cncf.io/maintainers/governance)

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# Project Templates

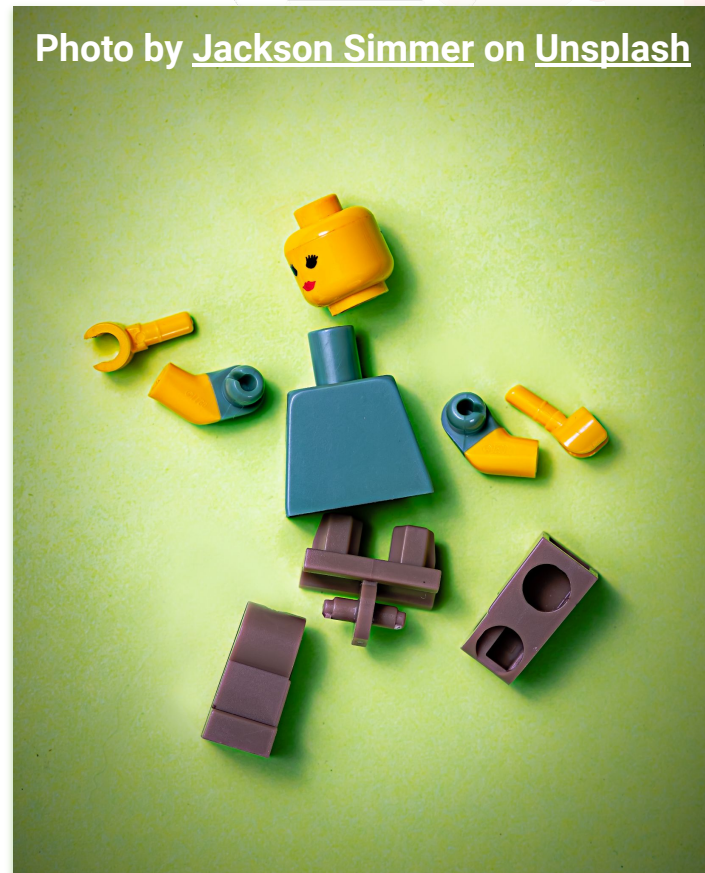
## Governance:

→ Maintainer, Election, Subproject

## Contributing:

→ Contributor Ladder, Reviewing  
README and More

Photo by [Jackson Simmer](#) on [Unsplash](#)



 [github.com/cncf/project-template](https://github.com/cncf/project-template)







# Maintainers Circle

Connect with your peers  
Share best practices  
Commiserate  
Grow

Photo by [Daniel Öberg](#) on [Unsplash](#)



[contribute.cncf.io/about/maintainers-circle](https://contribute.cncf.io/about/maintainers-circle)







# What if you need a resource that doesn't exist yet?

We'll help you build it

Why build with us?

- Collaborate with experts
- Benefit the community
- Team up with other volunteers

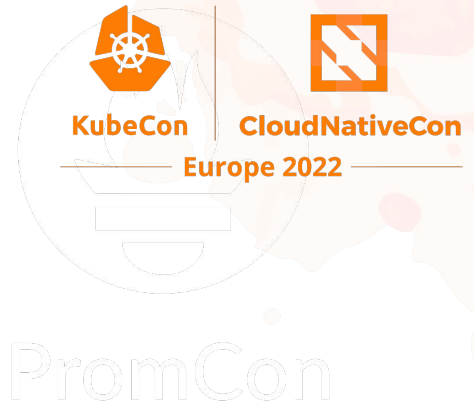


Photo by Alberto G. CC BY 2.0





# Let's connect!



Join our **Slack channel**

#tag-contributor-strategy (CNCF Slack)

Sign up for our **mailing list**

[lists.cncf.io/g/cncf-tag-contributor-strategy](https://lists.cncf.io/g/cncf-tag-contributor-strategy)

Drop into our **meetings**

Search for Contributor Strategy [cncf.io/calendar](https://cncf.io/calendar)

Participate in **Maintainer Circle** meetings

#maintainer-circle on the CNCF Slack

You can find all info here  
[cncf.io/contributor-strategy](https://cncf.io/contributor-strategy)

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Learn more at [cncf.io/contributor-strategy](https://cncf.io/contributor-strategy)



# Help us get the word out!

**HOW?** Sharing our blog that summarizes what you've heard today: [cncf.io/contributor-strategy](https://cncf.io/contributor-strategy)

Our group is still new, and not enough projects know about us — thanks for your support!



Tweet or follow us at [@geekygirldawn](https://twitter.com/geekygirldawn) and [@CathPaga](https://twitter.com/CathPaga)



Learn more at [cncf.io/contributor-strategy](https://cncf.io/contributor-strategy)



# Thank You and Discussion Time!

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🐦 @geekygirl dawn



**Catherine Paganini**

[catherine@buoyant.io](mailto:catherine@buoyant.io)

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