Hack/Doc Partnerships for Library Projects

Workbook

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“...One of the groups [at the National Digital Initiative hackathon] was looking at a text analysis from a set of Supreme Court nomination websites and the results were looking a little funny. Some words didn’t make sense in context to the scholars but luckily a Law Librarian was sitting at their table. He explained a little bit about the contours of the data set and why they might be getting some of the artifacts they were seeing. And he suggested ways to refine that query to improve the quality of the results. It’s a great example of the unique service we provide in libraries.”

Hack/doc goals

Template: “Goals and Roles”

Our hack/docs have always included the following goals:

1. **Mentoring / shared experience for participants**
   a. Guiding question: How can we work together to collaborate on types of projects like these? We’ll work out issues from technical to skill set and learn how we each complement one another.
   b. Event actions: work in teams, and then pairs.

2. **Products**
   a. Guiding question: What can we develop as a team? We’ll work on a select number of projects (1-2) that can help us determine what can be done.
   b. Pre-event actions: set up VM in advance, determine documentation environment.

3. **Networking**
   a. Guiding question: How do we know what we know? How can we reach out to one another post-hack/doc?
   b. Actions: “round robin” skill sharing at the beginning and middle of event, frequent breaks, informal / less intense atmosphere, after-action review.

Exercise: what are your hack/doc goals?
**Getting ready to hack/doc**

**Basic timeline**

In general, we begin planning our next hack/doc soon after the prior one ends.

<table>
<thead>
<tr>
<th>What we do</th>
<th>When we do it</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set date and gauge interest (quick survey)</td>
<td>3 months beforehand (our hack/docs are 3-4 times per year)</td>
</tr>
<tr>
<td>Solicit topics, review meeting minutes and hack/doc minutes to get list of potential projects</td>
<td>Right after date is set</td>
</tr>
<tr>
<td>Send list to steering committee for final decision(s)</td>
<td>2 weeks after topic solicitation</td>
</tr>
<tr>
<td>Set up Google Drive for documentation, roles, goals, experts, resources</td>
<td>2 months beforehand</td>
</tr>
<tr>
<td>Review interest survey; send out information on hotel arrangements and survey on meal preferences, if needed</td>
<td>1-2 months beforehand</td>
</tr>
<tr>
<td>Set agenda</td>
<td>About 2 weeks beforehand</td>
</tr>
<tr>
<td>Initial Hangout / Skype to determine roles, goals, experts, resources (optional)</td>
<td>About 2-3 days beforehand</td>
</tr>
<tr>
<td>Welcome, overview, review of docs</td>
<td>DAY 1 BEGINS</td>
</tr>
<tr>
<td>Note-taking</td>
<td>During each event</td>
</tr>
<tr>
<td>Post-mortem / what worked?</td>
<td>After each day; wrap-up 1-2 days afterward</td>
</tr>
<tr>
<td>Wrap-up and setting up additional code/doc sprints</td>
<td>1-2 weeks afterward</td>
</tr>
</tbody>
</table>
Role identification: Resources and Managers

Template: “Goals and Roles”

Philosophy/rationale behind roles
The statement “don’t hesitate to ask questions!” can place an undue burden on the questioner in a new environment. We feel that our hack/doc events should have as few barriers to entry as possible -- from novice to expert -- and we use these “expert help” roles to facilitate this process. It’s not enough to make the environment open to questions; we must proactively identify experts who can raise common questions, note where the event might be losing steam, or keep discussions going between coders and dockers.

What do our resources/managers do?
- Reach out to participants in advance to aid in software installation or getting up and running with a particular task.
- Wear special nametags on the day(s) of the event to identify as a resource.
- Float around the room so that participants can ask questions one-on-one.
- Help ensure that the room is friendly to questions.
  - Are participants getting along?
  - Does the room dynamic provide a nice balance between “hack” and “doc”?
  - When should we check in with one another to see if things are working?

Exercise: brainstorming roles
These are some sample roles that participants can take in a hack/doc event. They are tailored for library development, but should reflect whatever your group needs to accomplish. Add roles that you think could be useful for your hack/doc event (and names of the perfect people to take up that challenge!).

<table>
<thead>
<tr>
<th>Name and email</th>
<th>Task or tool</th>
<th>Role</th>
<th>Comfort level*</th>
</tr>
</thead>
<tbody>
<tr>
<td>GitHub resource(s)</td>
<td>Resource(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vagrant</td>
<td>Resource(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Descriptive metadata</td>
<td>Resource(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical writing</td>
<td>Resource(s)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group dynamics</td>
<td>Manager(s)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comfort level = Expert/Intermediate/Willing to learn
Code of conduct (CoC)

We found it incredibly helpful to have a code of conduct document, and borrowed liberally from DLF, Ansible, and our host institutions (if there was an already established CoC) to write ours. We encourage you to use or develop your own, or borrow from ours!

Exercise: additional hack/doc CoC resources or verbiage

Attendee signup list

Information you may need to collect:
- Name
- Institution
- Contact information
- In-person or virtual attendance
- Dietary preferences or restriction
- GitHub username (if using GitHub)

Exercise: potential additional information
Documenting the hack/doc

One of the most useful parts of our hack/docs is the opportunity to capture what we are doing so that we can look back on the event and better understand how we met our goals and challenges.

Planning notes

- Template: “Planning notes”
- Template: “FAQ + troubleshooting”

We have identified some of our best practices and questions, and encourage you to use these materials to develop your own FAQs for participants. These documents can help you structure your hack/doc beforehand and during the event, as well as develop a list of questions you can have in advance for your participants.

Communal note-taking

- Template: “Day 1 Group Notes” and “Day 2 Group Notes”

Whatever method you choose, we think it’s a best practice to find a communal way to take notes and share them widely. It is also helpful if participants take their own notes and then add them or make them available as the hack/doc occurs.

Dev tools and resources

- Template: “Dev tools and resources”
- Template: “Help Documentation”

We often keep a list of the developer tools and resources that are useful for our hack/doc, including links to any online information, required platforms/OS, and key functionality. Our help documentation folder includes resources for each of the systems we use.

Recording your event

- Template: “Help documentation” > "How to Record Hangouts on Air”

We have found that it is helpful for participants to have a screen recording of what we did at the hack/doc or any presentations that we had. It is possible to use Google Hangouts to livestream your event and then make it available after the event ends via YouTube.
Hack/doc: make a peanut butter and jelly sandwich

Goal
Write and document steps to make a peanut butter and jelly sandwich.

Instructions
1. Discuss the best way to make a peanut butter and jelly sandwich that will work for your group. This may include (but is not limited to): peanut butter choice (or other reasonable spread; perhaps a group member has an allergy?), jelly choice, bread choice, and preparation steps.
2. Take note of the questions that arise as you work through this problem. Where do your assumptions dovetail with your group? Where do they diverge?
3. Determine roles for this assignment. Who will write code? Who will document? Who will test?

Group number: _______________

Roles:

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Docker</td>
</tr>
<tr>
<td></td>
<td>Coder</td>
</tr>
<tr>
<td></td>
<td>QC/Tester</td>
</tr>
</tbody>
</table>
Peanut butter and jelly wrap-up

Where did this process work well?

Where could the process improve?
Conclusions and group discussion

- Where would a newcomer find this event welcoming? Challenging?
- As you plan your library’s hack/doc, what unique aspects might you need to consider?
- How are you planning on using this type of event? What projects do you have? What are the perceived difficulties in spinning this up?

Post Mortem

Templates: “Post Mortem of Hack/Doc”

The post-mortem ideally takes place within 1-2 weeks after the hack/doc, and provides a chance for all participants to reflect on the strengths and weaknesses of the event.

- We have followed an “After-Action Review” method, where we discuss what we intended to happen, what actually did happen, what worked, and what didn’t.
- Through this process, we use our collaborative notes to create a final review of what was covered in the hack/doc, what remains to do and areas of responsibility, and suggestions for improvements for the next hack/doc event.

Templates on github

Complete URL printed

https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc