Hack/Doc Partnerships

for Organizational Projects

Workbook

NERCOMP 2017

March 28, 2017

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Table of contents

[Hack/doc goals 3](#_Toc480902833)

[Exercise: what are your hack/doc goals? 3](#_Toc480902834)

[Getting ready to hack/doc 4](#_Toc480902835)

[Timeline: planning event, creating agenda 4](#_Toc480902836)

[Role identification: Resources and Managers 5](#_Toc480902837)

[Exercise: brainstorming specialty areas and roles 5](#_Toc480902838)

[Code of conduct (CoC) 6](#_Toc480902839)

[Exercise: additional hack/doc CoC resources or verbiage 6](#_Toc480902840)

[Attendee signup list 6](#_Toc480902841)

[Exercise: potential additional information 6](#_Toc480902842)

[Documenting the hack/doc 7](#_Toc480902843)

[Pedagogy, best practices and troubleshooting 7](#_Toc480902844)

[Communal note-taking 7](#_Toc480902845)

[Tools, resources and help docs 7](#_Toc480902846)

[Recording your event 7](#_Toc480902847)

[Hack/doc: make a peanut butter and jelly sandwich 8](#_Toc480902848)

[Goal 8](#_Toc480902849)

[Instructions 8](#_Toc480902850)

[Peanut butter and jelly wrap-up 9](#_Toc480902851)

[Conclusions and group discussion 10](#_Toc480902852)

[Post Mortem 10](#_Toc480902853)

[Templates on github 10](#_Toc480902854)

[Complete URL printed 10](#_Toc480902855)

“...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.”

-- Kate Zwaard, “Collections as Data” event, Library of Congress, 27 Sep 2016. Address available at <http://blogs.loc.gov/thesignal/2016/10/ndi-talk-at-collections-as-data> (accessed 14 Oct 2016)

# Hack/doc goals

[Template: “Goals + Roles”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

Our hack/docs have always included the following goals:

1. **Mentoring / shared experience for participants**
   1. 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.
   2. Event actions: work in teams, and then pairs.
2. **Products**
   1. 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.
   2. Pre-event actions: set up VM in advance, determine documentation environment.
3. **Networking**
   1. Guiding question: How do we know what we know? How can we reach out to one another post-hack/doc?
   2. 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?

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# Getting ready to hack/doc

## Timeline: planning event, creating agenda

[Template: “Timeline: Planning Event”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) [Template: “Schedule: Daily + Hourly Agenda”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

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

|  |  |
| --- | --- |
| **What we do** | **When we do it** |
| Set up Google Drive   1. [Download Hack/Doc templates](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc): put into a shared Google Drive 2. Tweak, hack, edit the template files to suit your needs | 3 months before event |
| Set date   1. Gauge interest for dates (Doodlepoll) 2. Send “Save the Date” email   *Please save the dates of May 23-24, 2017 for our next Hack/Doc.*  *Location: \_\_\_\_ College (City, State)*  *Please use our* Google-Docs-Icon-lead.jpg[Template: “Attendee Signup List”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) *to sign up.* | 3 months before event (we run hack/docs 2-3 times per year) |
| Share with group   1. Google-Docs-Icon-lead.jpg[Template: “Event Logistics”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) (hotel arrangements, wifi, etc.) 2. Google-Docs-Icon-lead.jpg[Template: “Dietary Requests Form”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) | 2 months before event |
| Survey of hack/doc topics: create and share   1. Google-Docs-Icon-lead.jpg[Template: “Survey: Hack/Doc Topics + Roles”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) | 2 months before event |
| Set and share agenda   1. Google-Docs-Icon-lead.jpg[Template: “Schedule: Daily + Hourly Agenda”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) | About 2 weeks beforehand |
| Pre-conference Hangout/Skype to determine roles, goals, experts, resources (optional) | About 2-3 days beforehand |
| Welcome, overview, review of docs   1. Google-Docs-Icon-lead.jpg[Template: “Schedule: Daily + Hourly Agenda”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) | DAY 1 BEGINS |
| Communal note-taking   1. Google-Docs-Icon-lead.jpg[Template: “Day 1: Group Notes”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) 2. Google-Docs-Icon-lead.jpg[Template: “Day 2: Group Notes”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) | During each event |
| Post-mortem: What worked? What didn’t?   1. Google-Docs-Icon-lead.jpg[Template: “Post Mortem of Hack/Doc”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc) | After each day; wrap-up 1-2 days afterward |
| Wrap-up and setting up additional code/doc sprints | 1-2 weeks afterward |

## Role identification: Resources and Managers

[Template: “Goals + Roles”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

***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 to aid in software installation or getting started w/ 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 specialty areas and roles

These are some sample specialty areas and roles that participants can take in a hack/doc event; please edit to suit your event’s needs. While we are all here to help each other, these participants are particularly adept at the following aspects of our hack/doc work and are willing to be poked.

|  |  |  |  |
| --- | --- | --- | --- |
| Name + Email | Speciality Area | Role: Resource or Manager? | Comfort\* |
|  | GitHub |  |  |
|  | Islandora, Drupal, PHP, Drush, or Tuque |  |  |
|  | Vagrant, VirtualBox, or Docker Engine |  |  |
|  | Content expert |  |  |
|  | Descriptive metadata (MODS, DC, SOLR) |  |  |
|  | Technical writing |  |  |
|  | Group dynamics, floater, or code of conduct |  |  |
|  | Unit or logic tests |  |  |
|  | Project-specific leader |  |  |
|  | Facilitator/group dynamics, photographer |  |  |
|  | User experience + UI |  |  |
|  | Best practices researcher (i.e. has anyone already done this?) |  |  |

Comfort = Expert/Intermediate/Willing to learn

## Code of conduct (CoC)

 [Template: “Code of Conduct](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)”

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

### Exercise: additional hack/doc CoC resources or verbiage

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## Attendee signup list

[Templates: “Attendee Signup List” and “Dietary Requests Form”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

Information you may need to collect:

* Name
* Email
* Institution
* Github username (or other contact information)
* In-person or virtual attendance
* Dietary restrictions or preferences

### Exercise: potential additional information

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## 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.

### Pedagogy, best practices and troubleshooting

 [Template: “Pedagogy + Best Practices + Troubleshooting”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

We have identified some of our best practices and areas to troubleshoot before and during the hack/doc. We encourage you to use these materials and add to them for your 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”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

[Template: “Day 2: Group Notes”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

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.

### Tools, resources and help docs

 [Template: “Tools + Resources”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)  [Template: “Help Documentation”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

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"](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_hack_doc)

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.

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# 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:

|  |  |
| --- | --- |
| Name | Role |
|  | Docker |
|  | Coder |
|  | QC/Tester |
|  |  |
|  |  |

## Peanut butter and jelly wrap-up

Where did this process work well?

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Where could the process improve?

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# 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”](https://github.com/Islandora-Collaboration-Group/icg_information/tree/master/templates_how_to_run_a_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>

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