

1 Planning a NESCent-style hackathon project

1.1 Preconditions

A vision for a hackathon.

1.2 Roles involved

Instigators, Sponsors, Organizers.

1.3 Outputs

Scoping statement and plans for Publicity, Recruitment, Supportive technology, Pre-event engagement, Meeting logistics, and Follow-up.

1.4 Process

Development of a concrete plan is preceded by 2 other stages, as follows:

- Visioning and sponsorship. Instigators begin with an idea they feel will attract participants and align with the goals of potential sponsors. They use this vision to secure financial support, which may take anywhere from weeks, to many months in the case of a formal grant proposal.
- Leadership team formation. Armed with an appealing vision and sponsorship, instigators recruit a leadership team of 5 organizers enthusiastic about the vision, and dedicated to carrying out the work of planning the hackathon and recruiting participants. Recruiting volunteer organizers may take days to many weeks.
- Plan development. Working with a fixed budget, and guided by the vision, the organizers delineate the scope of the hackathon and create a concrete plan. This will require 5 to 8 meetings (1 hour each), spread out over as many weeks to allow organizers to research options, make arrangements, and respond to changing circumstances (assume 1 hour of work per person per meeting).
 - Scoping. Choosing the scope is a balancing act between advancing the goals of the sponsors and allowing flexibility for members of the target community to make the most of their participation by leveraging their unique interests and skills. Furthermore, the organizers must be invested in the plan, even when the vision has been pre-determined by an agreement of the instigators with the sponsor. This means that the organizers need some flexibility to interpret the vision in a way that stimulates their commitment. The end result of scoping is a written statement (e.g., a paragraph of written text) that specifies any technological constraints (e.g., a particular language such as R) and programmatic targets (e.g., phylogenetic models).
 - Outreach. The plan for outreach is mainly focused on recruitment. That is, the organizers want to reach out to a particular community whose members have the capacity and the will to contribute to the goals of the project. The organizers also may wish to publicize the event to a larger community of non-participants. The outreach plan should specify the venues (e.g., web sites, email lists) in which the event will be publicized.

- Recruiting. The recruitment plan must specify a target community, criteria for participation, and diversity goals, consistent with the amount of support that can be provided. The plan may mix direct invitations with a call for applications. The review of applications is the most time-consuming task for organizers: the exact timing and burden of this task should be considered carefully (see the guidelines for recruitment). An optional but important part of the recruitment plan is to consider whether to support remote participation.
- Supportive technology. There are many choices for supportive technology in regard to code repositories, shared documents, remote participation, and social networking. Committing to a set of preferred technologies, rather than allowing each hackathon team to make its own choices, will make the project more coherent, improving the ability to provide training, monitor progress, and track outcomes. Ideally, participants and facilitators will commit to a limited set of source-code control systems (e.g., GitHub), social networking strategies (e.g., hash tags), and remote participation strategies (e.g., Google+ hangouts). Participants may require training in the preferred set of technologies.
- Pre-event Engagement. The organizers provide opportunities for discussion mediated by group audio- or videoconferences, email lists, or issue-trackers. This may seem like a futile exercise given that key participants may ignore it. However, this step is valuable because it provides (1) an opportunity for participants to introduce themselves, get comfortable with the project, and begin building social ties, (2) an early opportunity to discuss specific ideas, and (3) a crucial forum for organizers to assess needs for training, e.g., pre-event engagement may reveal a need for training in a technology that is important for the hackathon but unfamiliar to most participants.
- Event logistics. Organizers make all the usual arrangements for a multi-person meeting regarding travel and siting. Institutions such as universities often have staff dedicated to helping people organize meetings. The requirements specific to a NESCent-style hackathon are (1) a room large enough for plenary sessions with 30 people, allowing for open-space pitching (wall-space or easels for up to 10 posters, allowing freedom of movement), (2) break-out spaces for up to 7 teams, either in separate rooms or in a large room with flexibility to rearrange tables and chairs, (3) wireless internet and power outlets. All of this can be done in a single room of 1200 square feet with moveable chairs and tables (ideally, round ones). A common alternative is for teams to seek out separate breakout spaces close to the main room.
- Travel. The plan for travel must, at a minimum, provide participants with precise instructions for planning their own travel and lodging. For supported travel, the plan must specify how travel arrangements and reimbursements will be made, consistent with the budget and the requirements of the sponsoring organizations.
- Follow-up. By their nature, hackathons focus on what can be produced during the event itself: follow-up is optional and secondary. However, the organizers may wish to plan for a report to the sponsor, and they may wish to prepare for the case in which hackathon teams produce something that warrants follow-up activities such as a publication or grant proposal.