

Maintaining viability and momentum in open-source volunteer projects

(How Kanban powered our transformation)



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Serial Tech Entrepreneur

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Program Manager

Consultant

Speaker

I ❤️ Effective Practices



All items with asterisks have a resource
provided in the slide appendix



Hack for LA Program Areas

Hack for LA brings together civic-minded volunteers to build digital products, programs and services with community partners and local government to address issues in the LA region.



**Citizen
Engagement**



**Civic Tech
Infrastructure**



**Diversity Equity &
Inclusion**



Environment



Justice



**Social
Safety Net**



**Voting &
Representation**



**Workforce
Development**

Hack for LA Assets in Q1 2019

The logo for Code for America, featuring the words "CODE" and "AMERICA" in bold, black, sans-serif capital letters, with "for" in a smaller, italicized, black, sans-serif font between them. The logo is set against a white rounded square background.

CODE *for*
AMERICA

A parent organization
with clearly
articulated missions*



Pipeline of
enthusiastic people
wanting to join our
organization to make
contributions*



Cool Branding



Challenges	Q1 2019	Grade
Viable projects	3 of 10 projects	👎
Reputation for organizational stability and delivery	Some relationships but lack of trust at a high level in municipal government	👎
Diversity	Lower than tech industry averages for LA	👎
Balance of junior/senior professionals	1 UX PhD	👎
Locations/Reach	Driving distance of 2x weekly hacknights High of 30 members in person	👎
DevOps and Technical support structures	projects hosted on personal accounts & passwords on spreadsheets	👎
Replicable Processes (Onboarding, etc.)	Improvised	👎
Delivery Framework	Siloed Projects	👎

How could we meet all those challenges?

**Why people are
coming?**

**Set our north
star**

**Tackle the
largest
challenge**

Jobs

**Workforce
Development**

**No Delivery
Framework**

Problems with our Existing Delivery Frameworks

1. No Delivery Plan
2. Work Gatekeeper
3. Stale issues
4. Minimal transparency
5. No visibility

How did we pick a Delivery Framework?

Benchmarking

Modeling

Pilot

Measure Results



**Was it just addition of
the Kanban?**

DELIVERY

Workforce Development

Imagine that you...



Can't use money to motivate your team



Team members can leave your project at any time



Must meet Stakeholder deadlines

**How can we
motivate them?**

BELONGING

TRANSPARENCY

The value of belonging [at work] was linked to

56 %

increase in job
performance



50 %

drop in
turnover risk



75 %

reduction in
sick days



**What are the barriers
to belonging?**

Work Gatekeeper



Available during work hours

Has own deliverables

High staff cost

Workers who quit a job in 2021 cited these issues

**Low
pay**

**Feeling
disrespected
at work**

**Working too
many hours**

**No opportunities
for advancement**

**Not enough
flexibility about
when to put in
hours**

“Kanban +” Delivery Framework *



- Available 24/7
- Self Help Structure

+

Issues/tickets

+

Updates

+

Contributing files

+

WIKI

+

Labels

Role ▼

Priority ▼

Skill Level ▼

Feature ▼

Size ▼

+

Milestones

+

Issue Parties

Onboarding to the Org



Creates Belonging

Slack



Google Drive



Github



CoP Invites



Onboarding to the Project Team

Pre-work Template - Design

New Design team members should start with by making this issue for themselves.

[Get started](#)

*

Pre-work Template - UX

New Research team members should start by making this issue

[Get started](#)

*

Pre-work Template - Developers

New developer team members should start by making this issue for themselves

[Get started](#)

*



Creates Agency

What is in a

Pre-work Template

Get started

*

Joining Communication channels

More Tool Invites

Reviewing the ToDo column

Confirming your ready for assignments

Reading Guidance on how to work on your first assignment

Understanding how to get help



Creates Agency



Reduces Unnecessary Work

What is in a

Pre-work Template

Get started

for Software Engineers

Everything that everyone else gets +

Environment setup via CONTRIBUTING.md

Being a good team member

Being a software engineering leader



Reduces Imposter Syndrome



Creates Knowledge Base

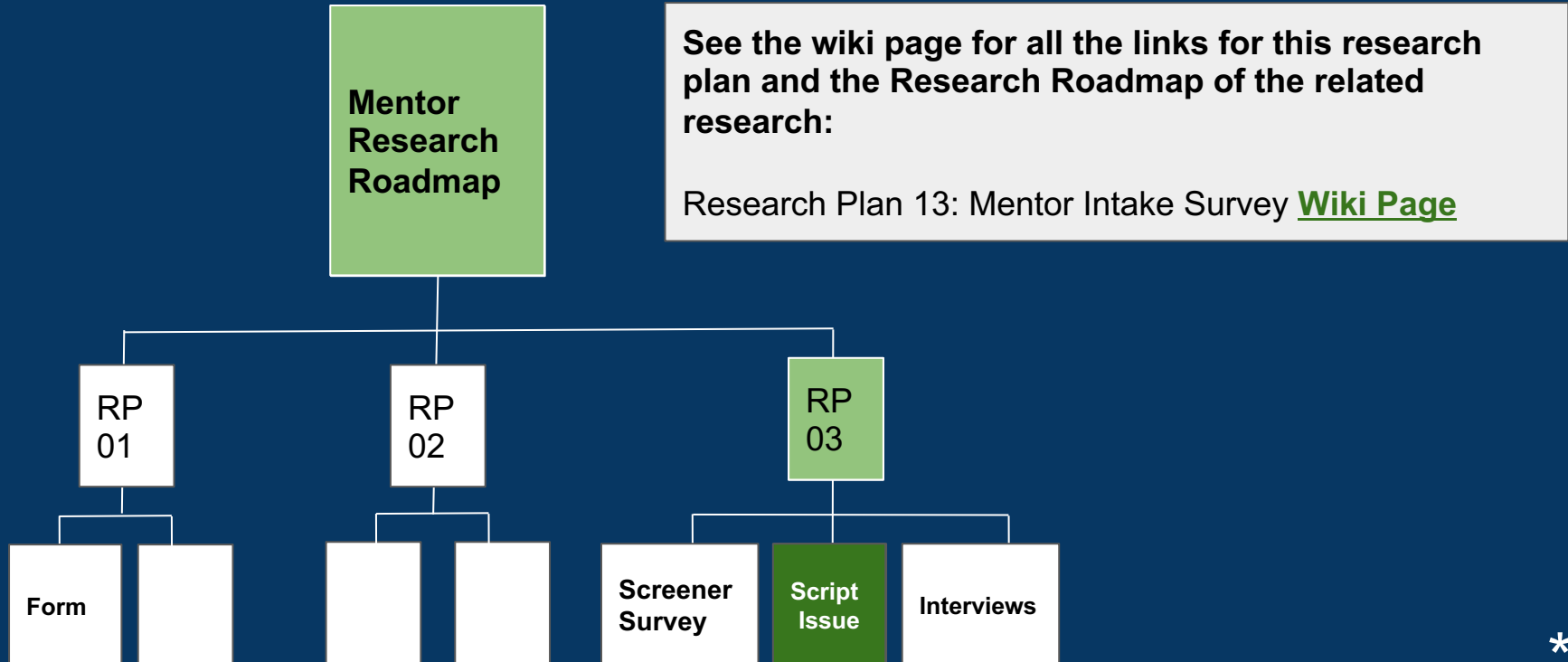


Increases Retention



Defined Pathway for
Advancement

Issues & WIKI / Knowledge base for Context



Issues should have a Definition of Done

Overview

Steps

ExperimentsInHo... commented on Dec 20, 2021 •
edited by Rabia2219 ▾

Member 😊 ...

Overview

We need to finish our mission statement for the project, so that we can use it in our brand guide, websites and one sheet.

Action Items

- ☐ Revise mission statement
 - (it has the word "to" three times in one sentence)
- ☐ Release dependency on [Update TWE Brand Book #256](#)

Resources/Instructions

- Current Mission statement (2021-12-20): Mission Statement : The Internship project provides an opportunity for students to work in the fields of the tech industry at LA's fastest-growing Civic tech non-profit organization to gain real-life work experiences to build confidence, competence, and encouragement to continue nurturing and developing their future in the tech industry.

Assignees

No one—assign yourself

Labels

[feature: branding](#) [role: UX writer](#)
[size: 1pt](#)

Projects

Program Management
[Prioritized Backlog ▾](#)

Milestone

05 - Style Guide

Development

[Create a branch](#)
for this issue or link a pull request.

Get More Work Completed with Smaller Issues *

The screenshot displays a Jira issue page for 'Update TWE Brand Book #256'. The interface is divided into a main content area on the left and a sidebar on the right. The main area includes sections for 'Overview', 'Action Items', and 'Resources/Instructions'. The 'Action Items' section contains a list of tasks, with the second item, 'Release dependency on Update TWE Brand Book #256', highlighted by a green rectangle. The 'Overview' section contains a paragraph about the mission statement. The 'Resources/Instructions' section contains a bullet point about the current mission statement. The sidebar on the right includes sections for 'Assignees', 'Labels', 'Projects', 'Milestone', and 'Development'. The 'Labels' section contains two labels: 'feature: branding' and 'role: UX writer', with a third label 'size: 1pt' highlighted by a green rectangle. The 'Projects' section shows a progress bar for 'Program Management'. The 'Milestone' section shows a progress bar for '05 - Style Guide'. The 'Development' section shows a link to 'Create a branch for this issue or link a pull request.'

ExperimentsInHo... commented on Dec 20, 2021 •
edited by Rabia2219 ▾

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feature: branding role: UX writer
size: 1pt

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Program Management
Prioritized Backlog ▾

Milestone

05 - Style Guide

Development

Create a branch for this issue or link a pull request.

Issues Need Detailed Requirements or Checks

SAUMILDHANKAR commented on Jan 2 • edited by ExperimentsInHonesty ▾ Member 😊 ⋮

Dependency

- ☐ 🔄 [GitHub Actions: 2 weeks inactive label bug #2634](#)

Overview

For this issue, we need to refactor multiple if else statements in [add-label.js](#) file so that our code quality and efficiency improves.

Action Items

- ☐ Review add-label.js file located at (<https://github.com/hackforla/website/tree/gh-pages/github-actions/add-update-label-weekly>)
- ☐ Refactor [multiple if else statements](#) such that they can be combined into functions
- ☐ Check to see if wiki page for this GHA needs to be updated to reflect your changes

Checks

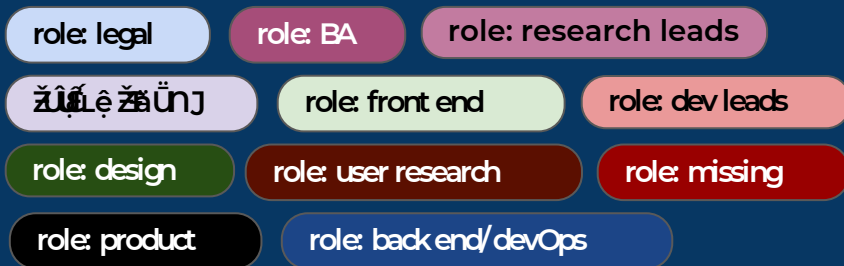
- ☐ Test in your local environment that it works
- ☐ Make sure all the functionalities in [add-label.js](#) file still work fine

Resources

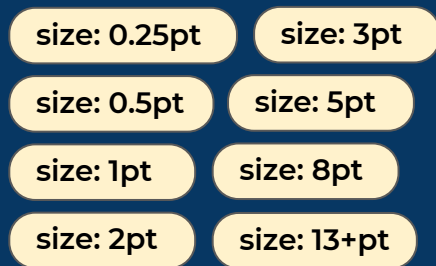
- File where changes need to be made: [add-label.js](#)
- [Hack for LA's WIKI page for add-update-label-weekly](#)
- Hack for LA's [GitHub Actions Wiki](#)

Issue Responsibility, Dependencies and Size

Define Role Responsible



Size



Public Facing Features (a few examples)



Dependencies



Pass the **New team member** test

Ask yourself,

Can a new person coming onto the team work on this issue without needing to talk to you - the author?

Is it clear to a non technical audience?

Pass the **New team member** test

- ☐ Has specific context about the work
- ☐ Has clear requirements and/or checks
- ☐ Has a definition of done
- ☐ Is as small as it can reasonably be
- ☐ The new person assigned to it can start making progress as soon as they have absorbed the context, in a week or less (preferably 1 work day)
- ☐ Is properly labeled so that its clear
 - ☐ what the feature is
 - ☐ How long its expected to take
 - ☐ What type of role should work on it
 - ☐ Priority (milestone)
 - ☐ Skill level

Milestones for Issues

- Alignment on Priority
- Reduce time to Prioritize



Creates Transparency



Creates Visibility

Set milestone

Filter milestones

Open

Closed

01 Compliance

02 Security

03.01 Roadmaps

03.02 Onboarding flow

04 Donation flow

05 Know HfLA

06 Data strategy

07 Homepage launch

08 Team workflow

09 Program areas visibility

10 Frameworks

11 HfLA impact

12 Program areas revenue

W Ongoing


X Accessibility

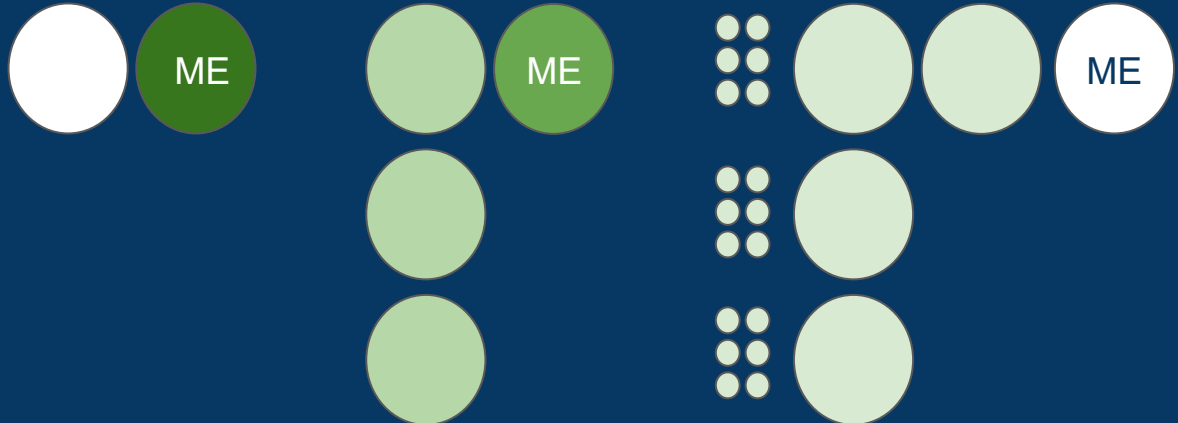
Y Technical debt

Z Excellent level

It seems Like a Lot

Everyone Makes Issues

- All team members make issues
- Issue making workshops 
- Issue Approval Process



Issue Updates

- Updates are not just for leads
- Issues store all the work
- Make progress not mental todo lists

Issue Updates

- Expect weekly updates
- Automate checks and general guidance
- Support your team members

2 Weeks Inactive *

Please add update using the below template (even if you have a pull request). Afterwards, remove the 'To Update !' label and add the 'Status: Updated' label.

1. Progress: "What is the current status of your project? What have you completed and what is left to do?"
2. Blockers: "Difficulties or errors encountered."
3. Availability: "How much time will you have this week to work on this issue?"
4. ETA: "When do you expect this issue to be completed?"
5. Pictures: "Add any pictures of the visual changes made to the site so far."

If you need help, be sure to either: 1) place your issue in the developer meeting discussion column and ask for help at your next meeting, 2) put a "Status: Help Wanted" label on your issue and pull request, or 3) put up a request for assistance on the #hfla-site channel.

You are receiving this comment because your last comment was before Monday, December 27, 2021 at 11:19 PM

Issue Updates

Pro Tip: 1 issue per person (except agendas)

Time off and Returning Issues to the Backlog

- Have processes for Time Off
- Have process for returning an issue to the Prioritized Backlog

GitHub Helps Our Never Ending Relay Race



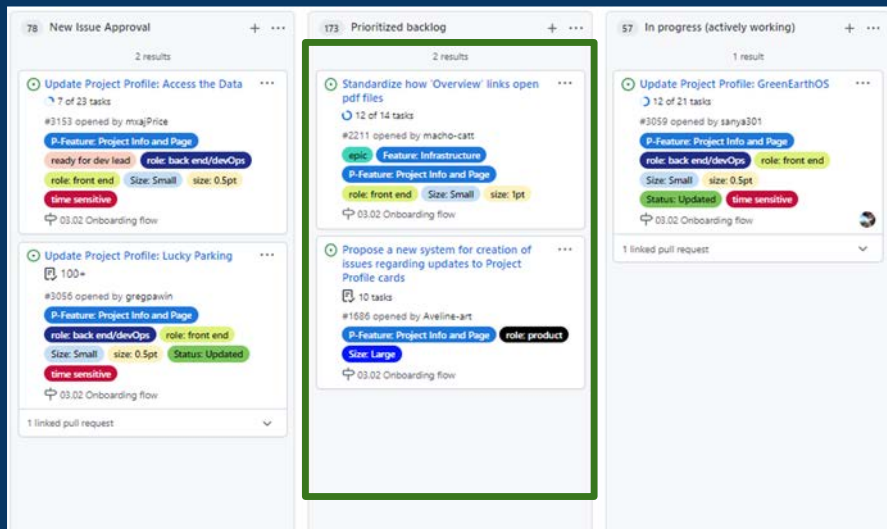
Labels (custom Kanban view)

- Ability to reduce noise



Role: Front End

Good First Issue



One Kanban Board To Rule Them All

- Unifying workflow with Team Handoffs for Product, Research, Design & Devs

Ready for Milestone

Ready for Research
Lead

Ready for Design Lead

Ready for Dev Lead



Ready for Dev Lead

Time Sensitive

Role: Design

Labels (sorting for insights)

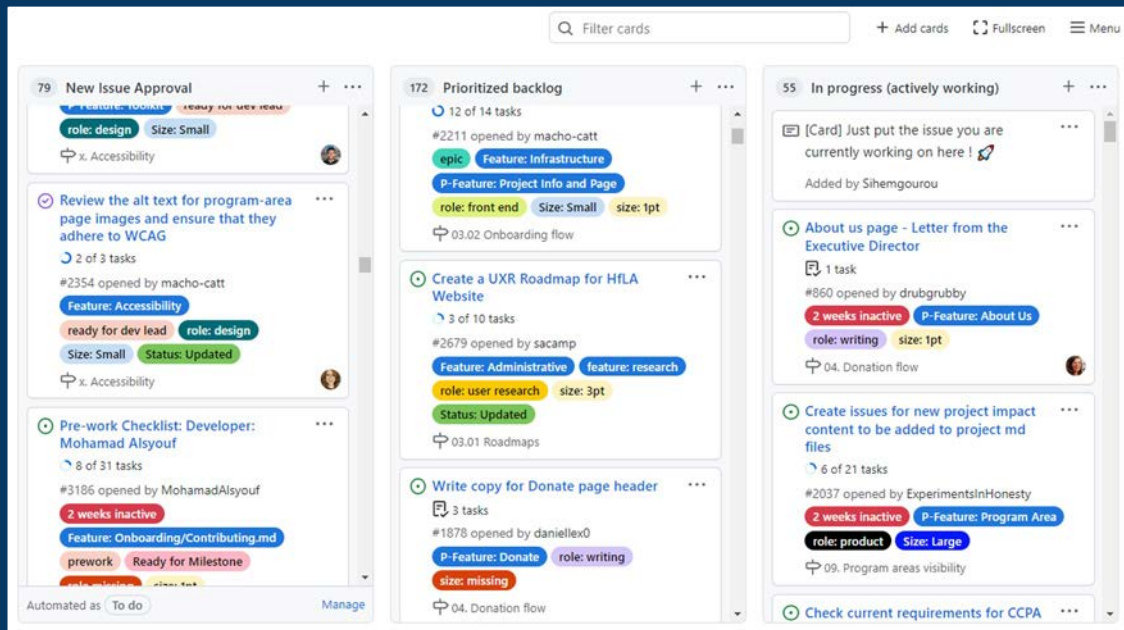
Metrics for Delivery by feature, role, priority & size

The image displays seven horizontal filter bars, each representing a different set of labels for sorting insights. Each bar starts with a magnifying glass icon. The labels are as follows:

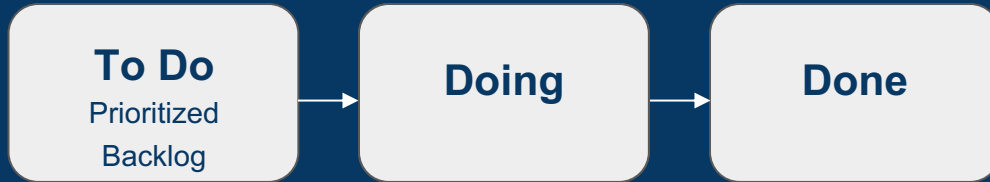
- Bar 1: Ready for Milestone (pink), Role: Front End (light green)
- Bar 2: Ready for Milestone (pink), Time Sensitive (dark red)
- Bar 3: Ready for Milestone (pink), Time Sensitive (dark red), Role: Front End (light green)
- Bar 4: Role: Front End (light green), Good First Issue (purple)
- Bar 5: Role: Research (dark red), Skill Level: Medium (teal)
- Bar 6: Role: Research (dark red), 07. Homepage launch (grey)
- Bar 7: Role: Research (dark red), Feature: Accomplishments (blue), 07. Homepage launch (grey)

Labels (sorting for Feature or Milestone status)

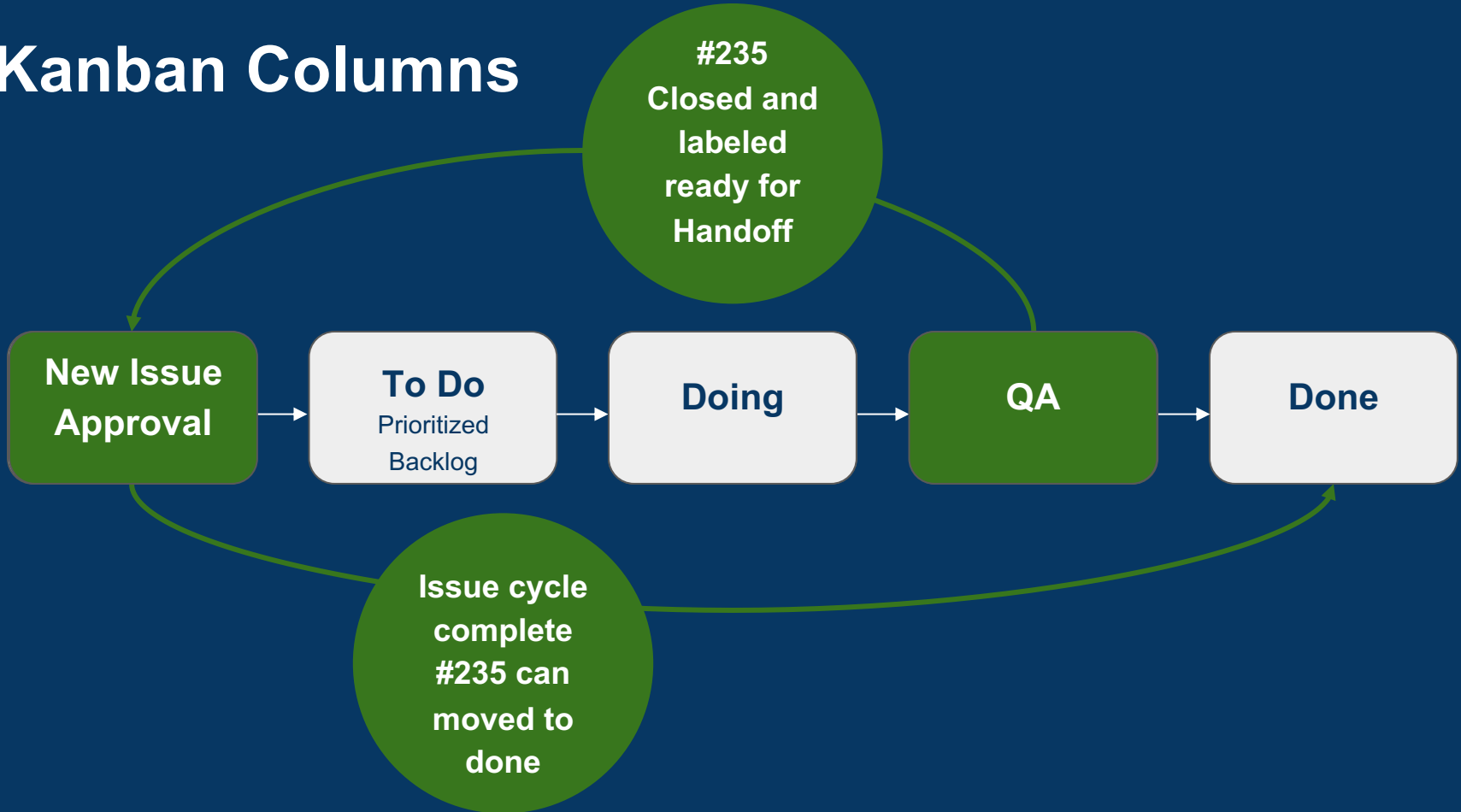
On demand High level view of feature roadmap progress in flight



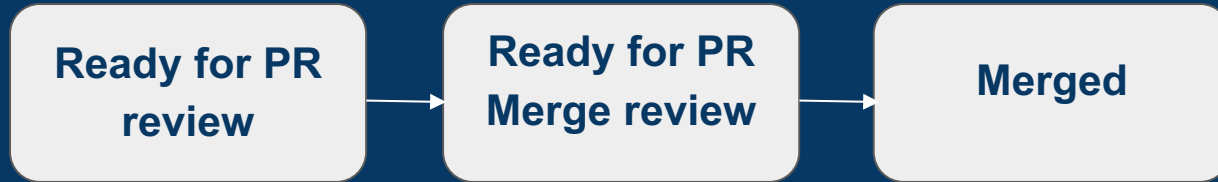
Kanban Columns




Kanban Columns



Kanban Columns for Engineering Team Members



Challenges	2019 SCORE CARD	2022 RESULTS
Viable projects	📄📄📄	<div> 📄📄📄📄📄📄📄📄 📄📄📄📄📄📄📄📄 + full pipeline </div>
Reputation for organizational stability and delivery	😄😞	😄😄😄😄😄
Diversity (project leads)	11% PoC - 33% F / 67% M	72% PoC - 3% NB / 41% M / 56% F
Balance of junior/senior professionals	1 UX PhD	PhDs in every practice area
Locations	2 in person hacknights per week (90 meetings annually)	<div> Fully Remote 6 Continents 1000+ zoom team meetings annually </div> 
DevOps and Technical support structures	projects hosted on personal accounts & passwords on spreadsheets	Paid enterprise level tools & security where required and free or donated where feasible
Replicable Processes (Onboarding, etc.)	Improvised	Researched, Structured & Measured
Delivery Framework	Siloed Projects	“Kanban +” on every active project

Lessons from the Journey

Utilize ongoing knowledge transfer process during WIP

Helped us embrace team churn instead of trying to prevent it.

Lower levels of burnout
Longer retention time

Redistributed the workload via automated guidance, team documentation

Reduced the burden for senior leads to support/onboard new members

More higher value work being completed & more overall work

Choose inclusive and free cross functional tools

Broadens skill development & brings all team members together

More seamless communication between practice areas on teams

Lessons from the Journey

A defined onboarding process supported by a Kanban + allows for new team members to

- gain confidence
- develop good habits and practices
- acclimate and start contributing to the company culture, and values.

Higher performing
team members who
experience better job
satisfaction

Velocity, stability
and predictability to
our projects

Appendix

For Maintaining Viability and Momentum in
Open-source Volunteer Projects

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