Maintaining viability and momentum in open-source volunteer projects

(How Kanban powered our transformation)

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I ❤️ Effective Practices

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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

CODE for AMERICA

A parent organization with clearly articulated missions*

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

Cool Branding

SCORE CARD

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

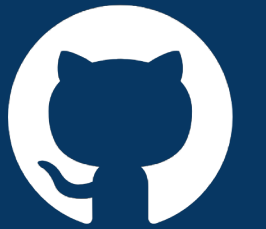
How did we pick a Delivery Framework?

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

2019 Harvard Business Review Study on Belonging in the workplace

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

2022 Pew Research Center survey

“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

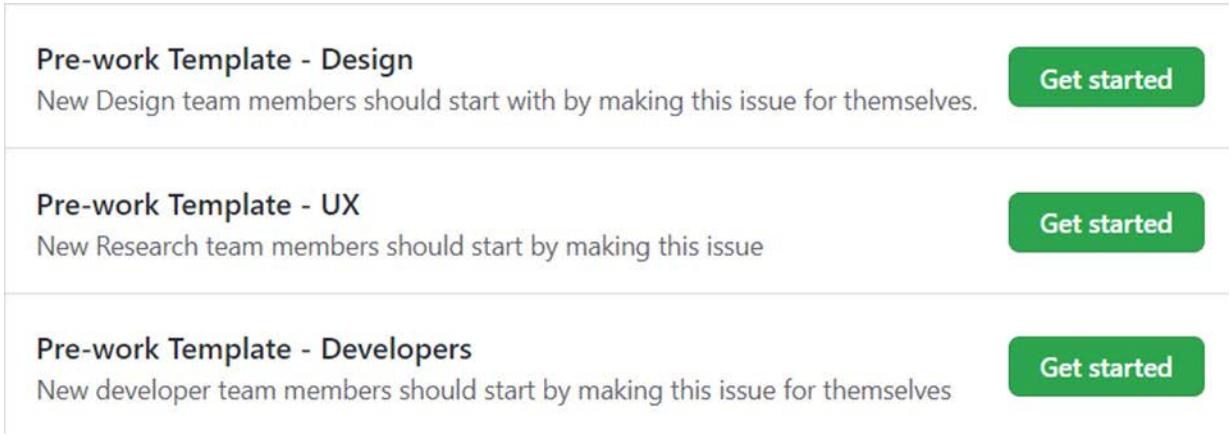
Google Drive

Github

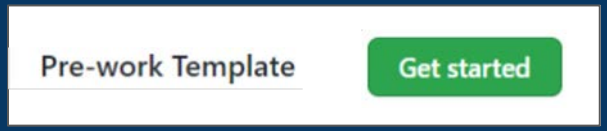
CoP Invites

*

Onboarding to the Project Team



Creates Agency

What is in a 

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Joining Communication channels

More Tool Invites

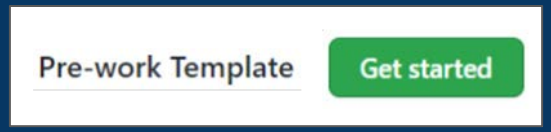
Reviewing the ToDo column

Confirming your ready for assignments

Reading Guidance on how to work on your first assignment

Understanding how to get help

- [x] **Creates Agency**
- [x] **Reduces Unnecessary Work**

What is in a  for Software Engineers

Everything that everyone else gets +

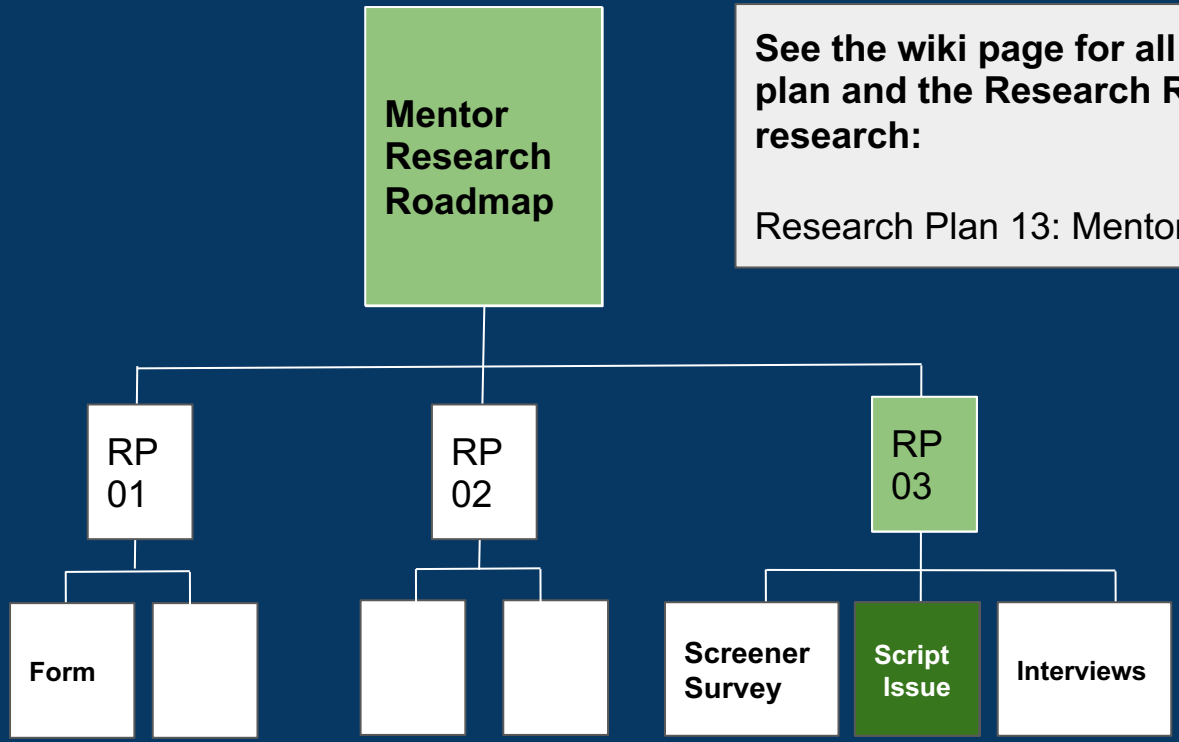
Environment setup via CONTRIBUTING.md

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



See the wiki page for all the links for this research plan and the Research Roadmap of the related research:

Research Plan 13: Mentor Intake Survey **Wiki Page**

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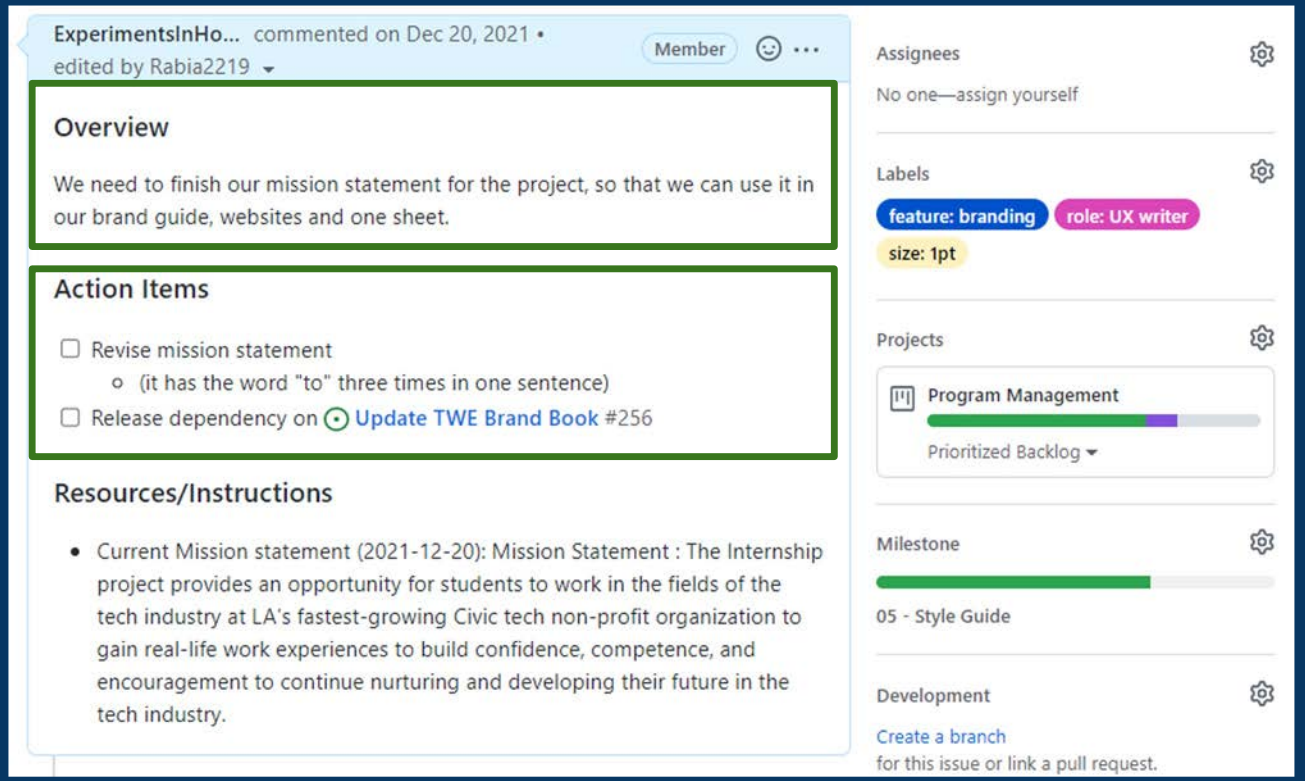
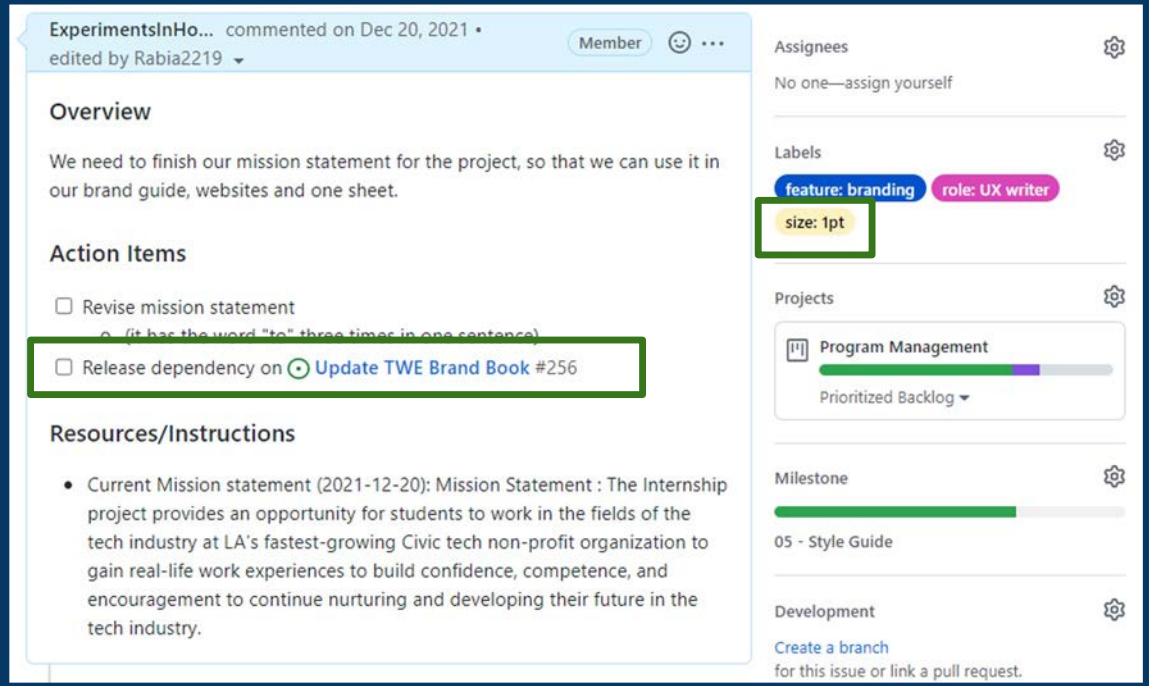
Issues should have a Definition of Done

Overview

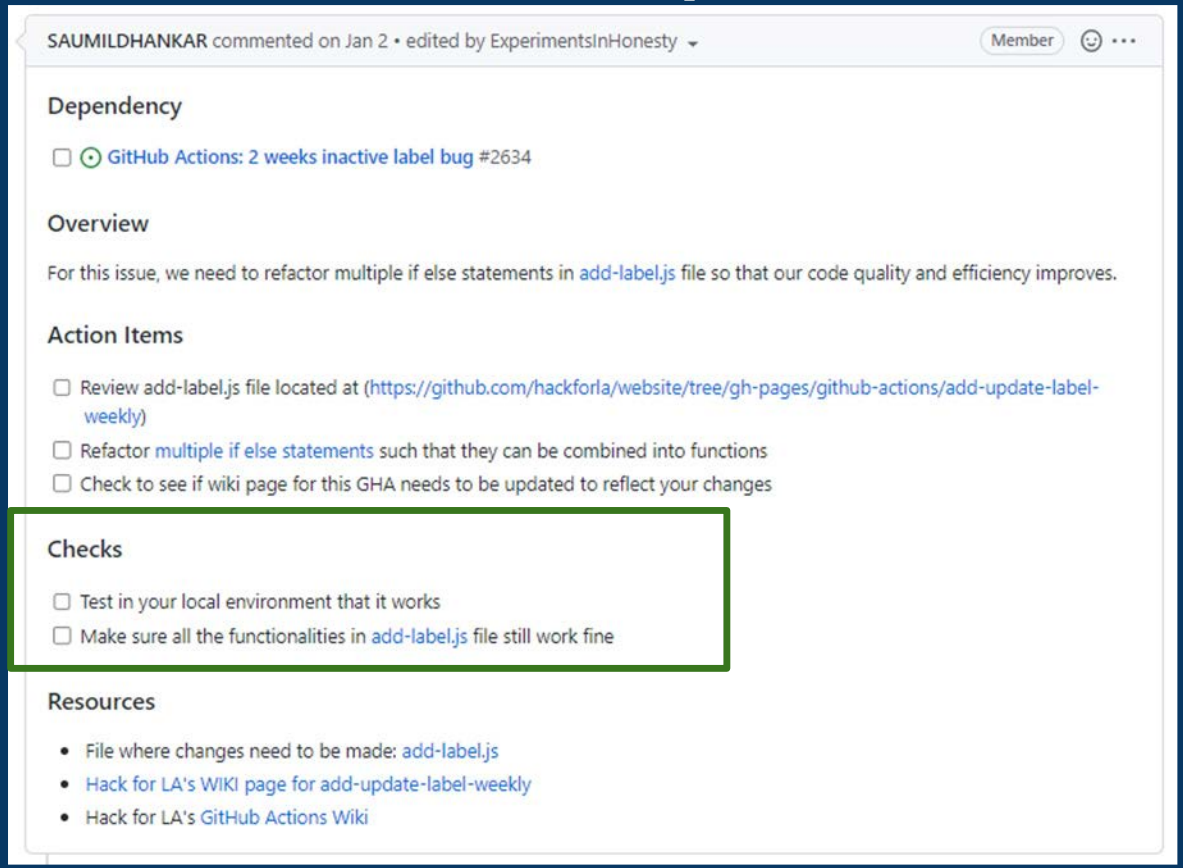
Steps



Get More Work Completed with Smaller Issues *



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

role: legal
role: BA
role: research leads
role: front end
role: dev leads
role: design
role: user research
role: missing
role: product
role: back end/ devOps

Size

size: 0.25pt
size: 3pt
size: 0.5pt
size: 5pt
size: 1pt
size: 8pt
size: 2pt
size: 13+pt

Public Facing Features (a few examples)

P-Feature: Navigation
P-Feature: About Us
P-Feature: Wins Page
P-Feature: Footer

Dependencies

dependency

*

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?

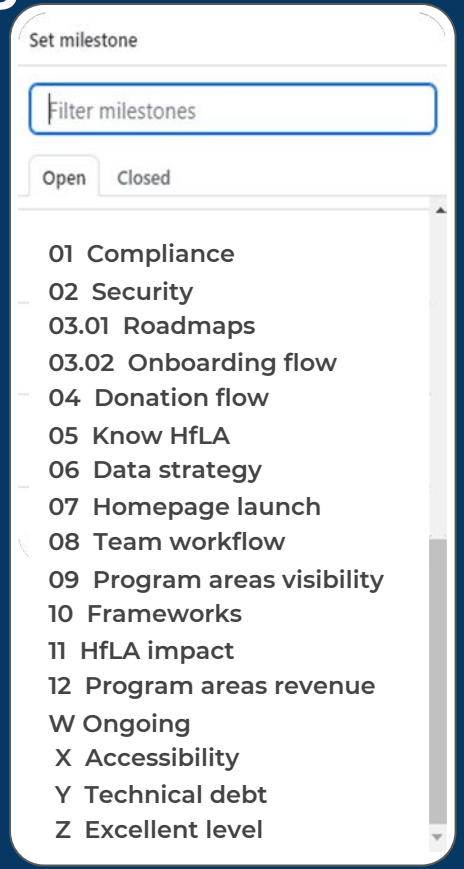
Pass the New team member test

- ❑ 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

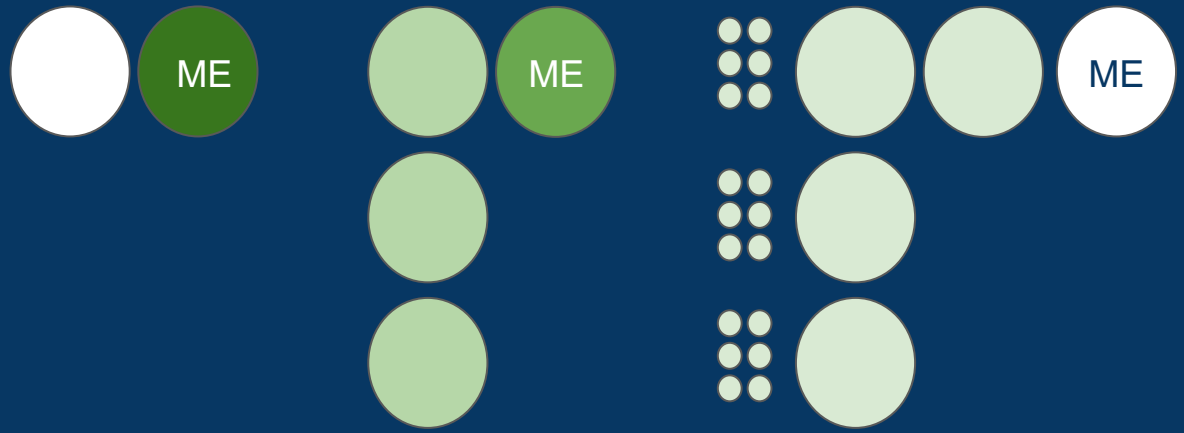
☑ **Creates Transparency**
☑ **Creates Visibility**



It seems Like a Lot

Everyone Makes Issues

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

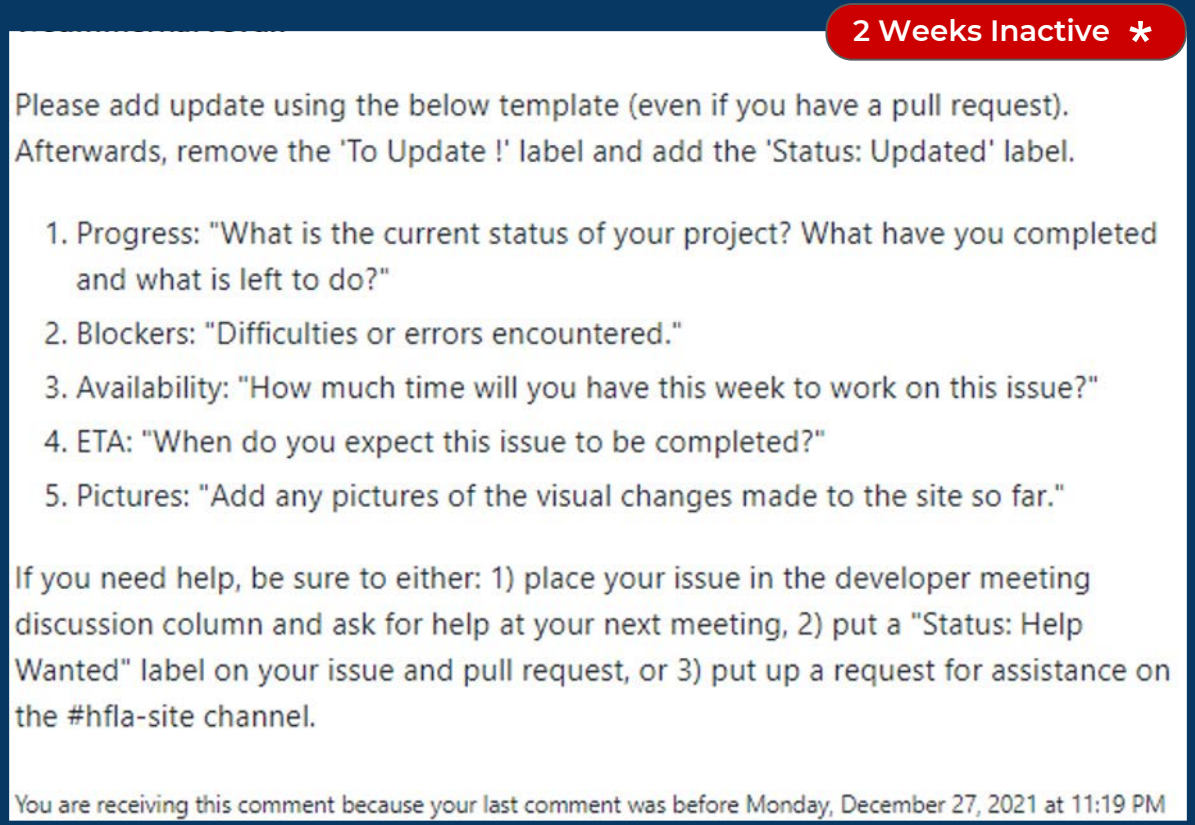


Issue Updates

- 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



Issue Updates

Pro Tip: 1 issue per person (except agendas)

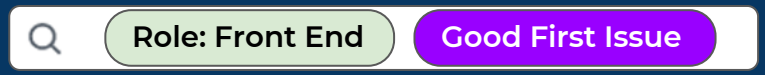
Time off and Returning Issues to the Backlog

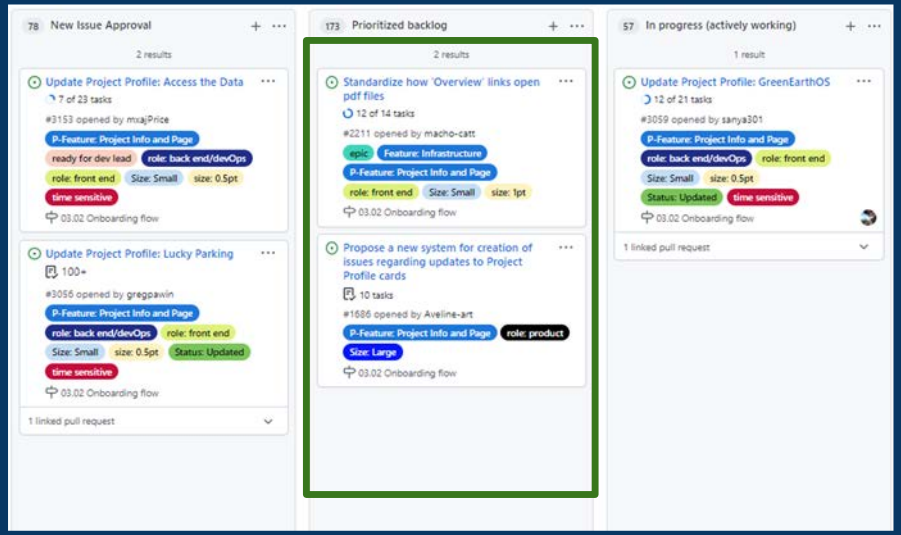
- Have processes for Time Off
- Have process for returning an issue to the Prioritized Backlog

GitHub Helps Our Never Ending Relay Race

Labels (custom Kanban view)

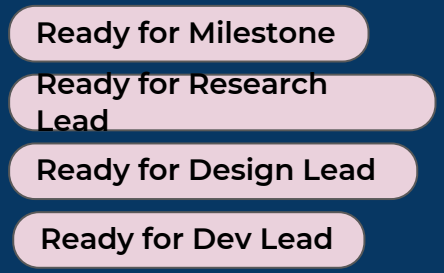
- Ability to reduce noise





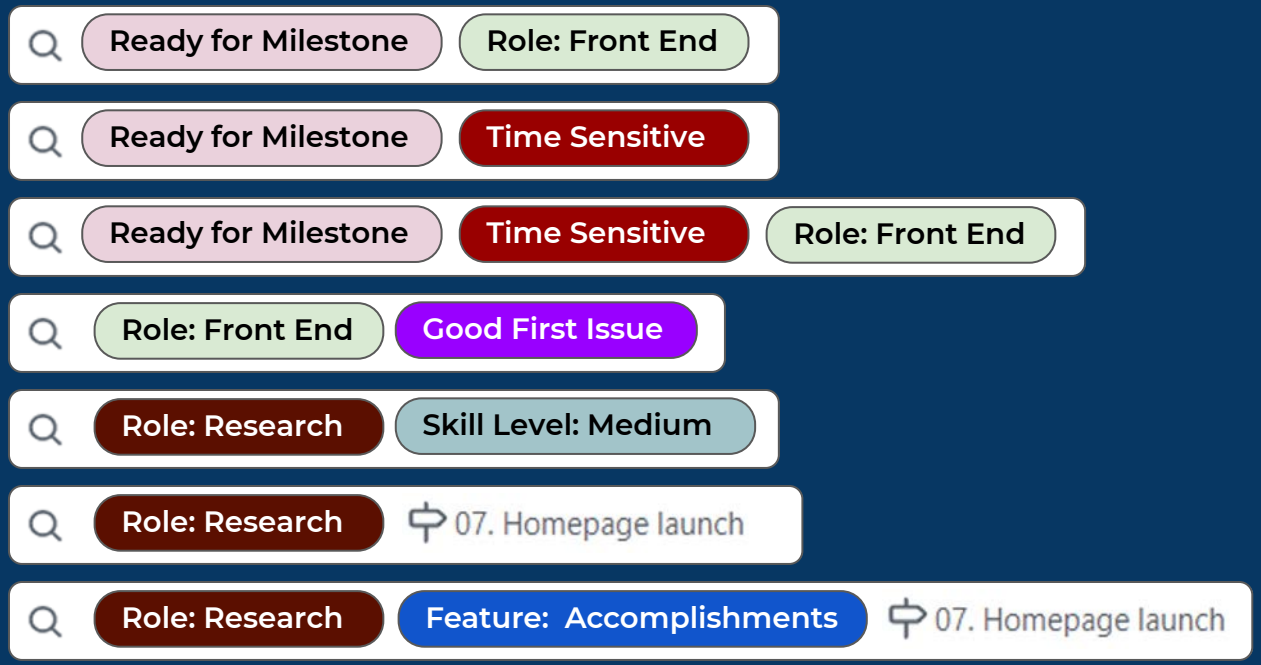
One Kanban Board To ~~Rule~~ Unify Them All

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



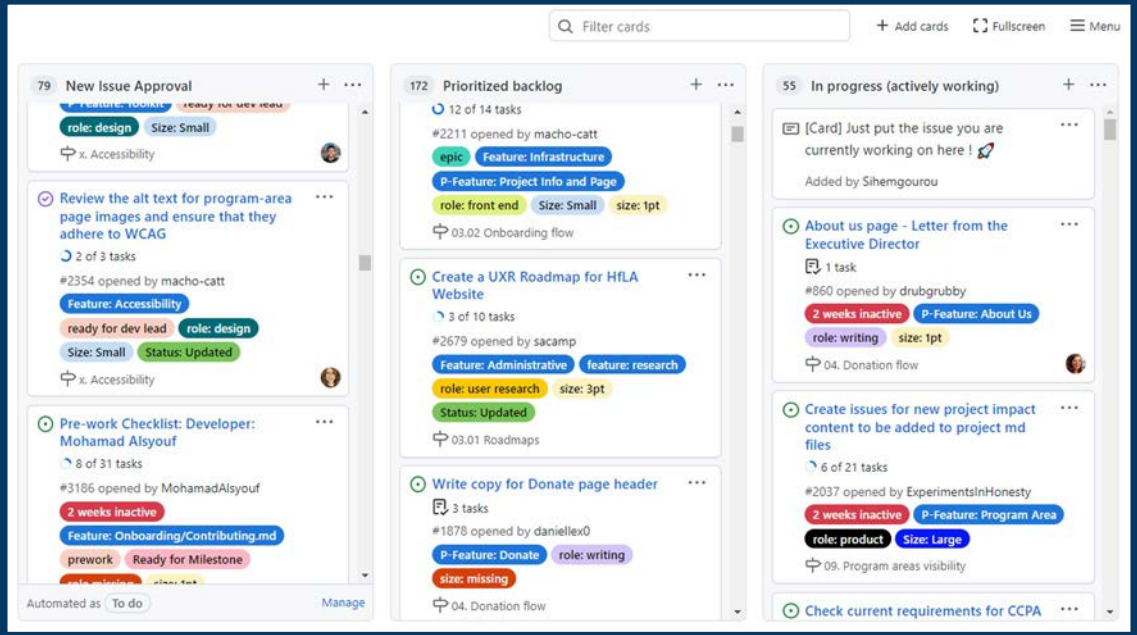
Labels (sorting for insights)

Metrics for Delivery by feature, role, priority & size

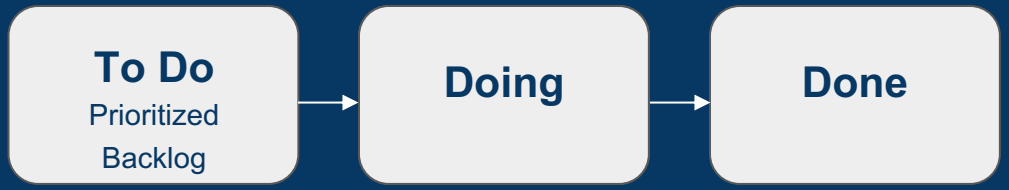


Labels (sorting for Feature or Milestone status)

On demand High level view of feature roadmap progress in flight



Kanban Columns



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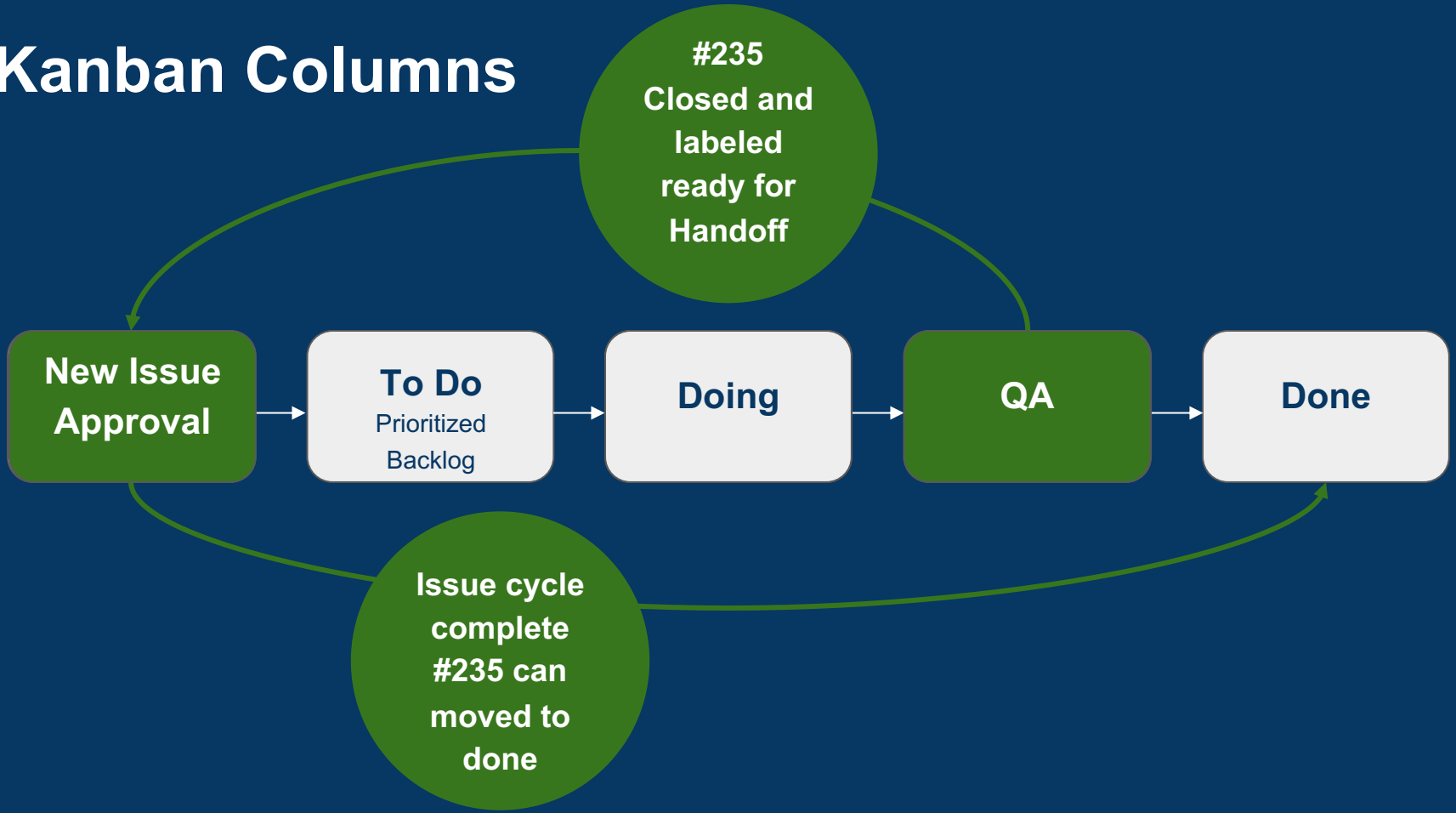
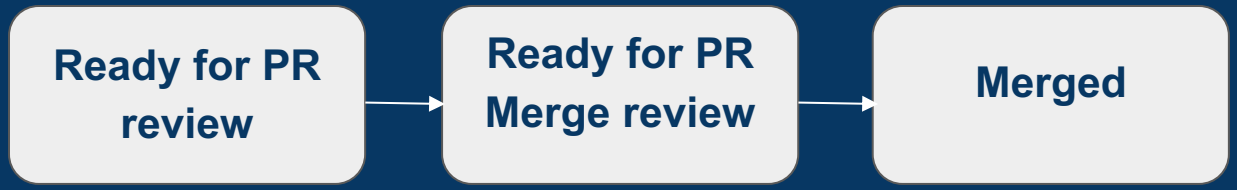


Kanban Columns for Engineering Team Members



Challenges	2019 SCORE CARD	2022 RESULTS
Viable projects	📄📄📄	📄📄📄📄📄📄📄📄 📄📄📄📄📄📄📄📄 **+ full pipeline**
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)	**Fully Remote** **6 Continents** **1000+ zoom team meetings annually**
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

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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