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Program Management for Open Source Projects

How to Guide Your Community-Driven,
Open Source Project

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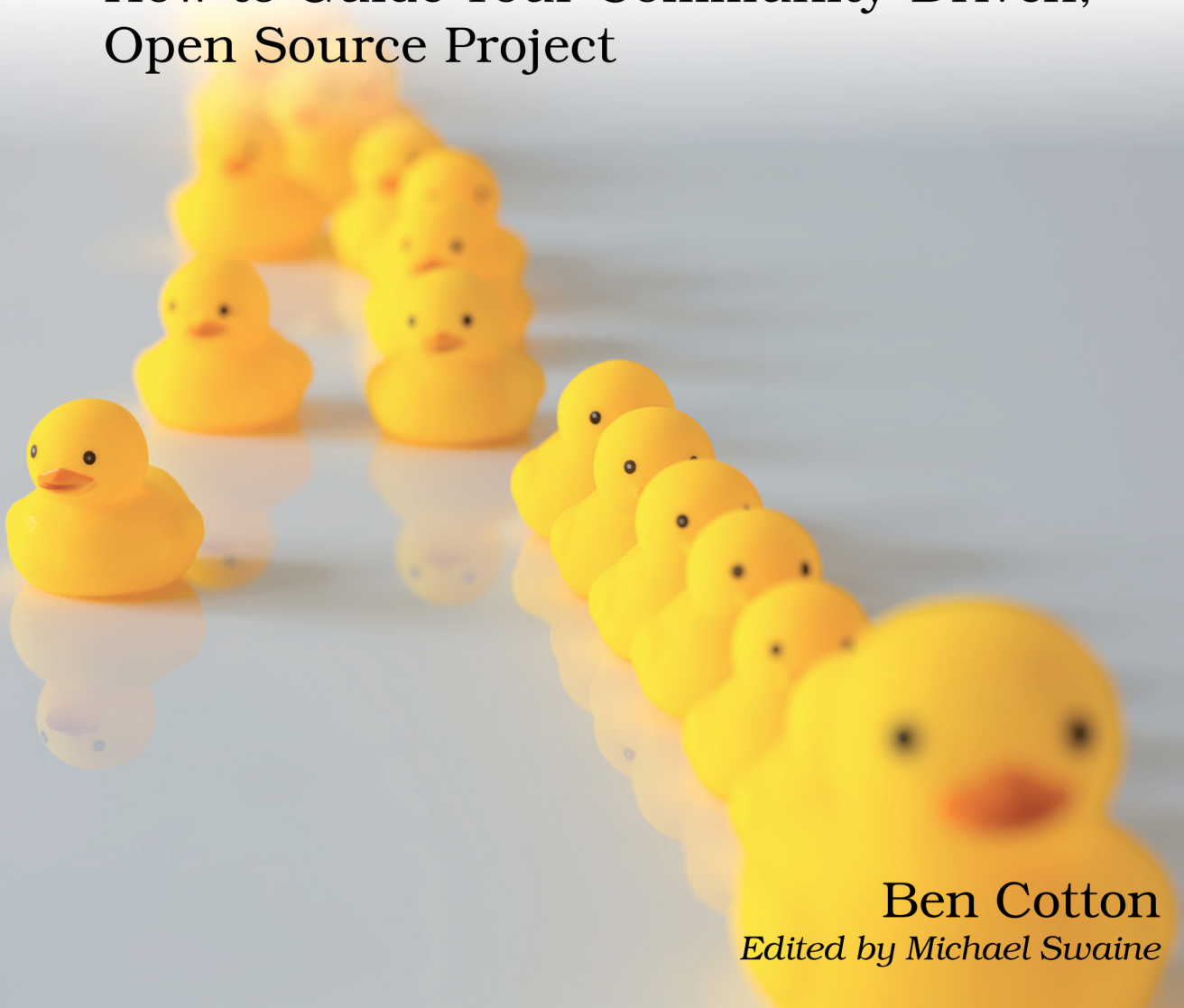
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Program Management for Open Source Projects

How to Guide Your Community-Driven,
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Schedule the Meeting

Problem: You're not sure when to hold a meeting. It's hard to find a time that works for everyone.

Scheduling a meeting is the most difficult task placed before a program manager. Let's see how we can make it work.

Even when you're scheduling a meeting within your company, where you can see everyone's calendars, and you all work relatively predictable hours, the odds of finding an open meeting slot drop exponentially with each additional attendee. In an open source project? Forget about it!

In addition to the time zone differences that you get in any large organization, the nature of open source contribution adds a dimension of challenge. Some people contribute as part of their day job, so they'd like to meet during "normal working hours." Others are volunteering and would prefer to meet during off-hours. Some volunteer contributors are forbidden by policy or network rules from contributing during work hours even if they wanted to. So even within a single time zone, you're probably out of luck finding a time that will work for everyone when you have more than a few people in the meeting.

Well I Tried to Find a Better Time

Years ago when I was the leader of the Fedora Documentation team, we all agreed that our meeting time was bad. At the time, we were a thriving team with a dozen or so regular contributors and even more who helped out around the edges. We had a few Red Hat employees, but most of us (myself included) were volunteer contributors. Team members were in Europe, North America, and Australia (and maybe other continents).

As a responsible and caring team leader, I decided to find a new time that would work better for the team. I set up a survey and shared it in the meeting and on the mailing list. After waiting a week or two, I took a look at the results. The best meeting time was...our current meeting time.

For those who had to stay up very late to attend the meeting, this was a disappointing result. But there wasn't going to be any time that didn't effectively cut off a good chunk of the community. We had to accept it and move on. It's entirely possible that the reason our current time won was that potential contributors who couldn't make the meeting decided not to join the team at all. I have no way of knowing, but that's something to bear in mind.

Some teams hold meetings twice, roughly 12 hours offset give or take, so that people anywhere in the world can attend. Avoid this approach.

The point of meetings is synchronous communication, which you can't have if there are two meetings. Folks who can attend both will feel compelled to do that so they don't miss anything. You've simply doubled the meeting load! At that point, you might as well save everyone the time and put it in an email.

A better approach is to alternate times. If you have a recurring meeting, consider alternating time slots to be globally accessible. For example, you might choose to hold a meeting at noon Eastern time (which is reasonable for Europe, Africa, and the Americas) and midnight Eastern time (which is reasonable for Asia, Oceania, and the Pacific coast of the Americas). This still splits your meeting attendees, but it doesn't duplicate the meeting. With luck, you'll have enough people who can attend both slots to provide some continuity. But at least this way, you've made it so that everyone can attend sometimes, even if no one can attend all the time.

One additional note on scheduling meetings: be aware of the daylight savings time (aka summer). Regardless of your opinions of the concept in general, it's inarguably a pain that not all countries change their clocks at the same time. Among my more useful contributions to the Fedora Project in my time as the Fedora Program Manager have been the twice-yearly "hey, clocks are changing soon! Here's a list of when various countries are changing" emails that I send.

As with time zones, you can't escape daylight savings time; you can only shift the problem. To make the meeting time unambiguous, you could decide to schedule meetings in Coordinated Universal Time (UTC), also known as "Greenwich Mean Time (GMT)" or "Zulu time." The problem with that choice is most people's lives take place in a local time zone, not UTC. This means that the hour that was available for your meeting during the summer might become double-booked during the winter. To avoid this, some teams set meetings for the local time of the person scheduling the meeting. Then it's consistent most of the year, with some confusion for a few weeks in spring and fall. Whichever way you do it, you're deciding which flavor of problem to embrace.

There's a lot to remember in this section, so let's review it quickly. When scheduling a meeting, remember that you're dealing with a global community that participates in different ways. No single meeting time is going to work for everyone. You can address this with alternating—not duplicated—meeting times. Summer time changes happen unevenly, so there will be a few weeks of confusion in the spring and fall. You'll need to accept that your meeting is going to be unworkable for *someone*. You can try to make sure the time works for the key people, but keep in mind what that does for your meeting's inclusivity.

Choose the Medium

Problem: You're not sure what medium to use for a meeting. Text, phone, and video are all options, and these days it seems everyone is on every platform.

The question of how you meet is as important as when you meet. Broadly speaking, you can choose from three categories of meetings: text, phone, and video. Let's take a look at the different options and consider when to use each.

Of course, in-person meetings are also a thing (and they are different enough from video meetings to warrant their own treatment), but they're rare enough in open source projects that we can ignore them for now. Arguably, virtual reality represents another distinct type of meeting. But the only VR meetings I have ever done were social events. I don't see VR meetings becoming common enough to discuss (at least not before the next edition of this book).

Each mode of meeting has strengths and weaknesses. What you pick will, as always, depend on the needs of your project. You may also find that mixing modes works best. In Fedora, most teams conduct text meetings, but the Workstation Working Group and KDE Special Interest Group prefer video meetings. The Fedora Council conducts regular business meetings via text but holds monthly video meetings with guests to look at a particular area of interest within the project.

Text Meetings

For this discussion here, “text meetings” are defined as any typed medium. Some projects use Internet Relay Chat (IRC). Others use Telegram, Matrix, Slack, or whatever else. It doesn't particularly matter for our purposes what platform you use. The right answer is whatever works for your community. You'll learn more about selecting a platform in [Appendix 1, Choose Your Tools, on page ?](#), but for now, let's assume you already have something that works. The following meeting example shows what a text-based meeting looks like.

```
[12:00:00] <bcotton> #startmeeting Example Text Meeting
[12:00:00] <MeetBot> Meeting name set to: example_text_meeting.
[12:00:01] <bcotton> #info This is an example of what a text-based
meeting might look like.
[12:00:03] <bcotton> #info For a reminder of our meeting procedures &
customs, see
[12:00:05] <bcotton> #link https://example.com/MeetingEtiquette
[12:00:10] <bcotton> #topic Roll call
[12:00:30] <alice> good afternoon
[12:00:45] <bob> hey, everyone!
[12:02:00] <bcotton> okay, let's get started
[12:02:10] <bcotton> #topic Old business: Bug 123 - Release 1.0
erases all user data when run on a leap day
[12:02:45] <bcotton> alice: you were going to make sure leap days are
real. have you had a chance to follow up on that?
[12:03:30] <alice> There's a one-in-four chance they are. I think
that's high enough for us to fix this bug
```



```

[12:03:45] <alice> #link https://en.wikipedia.org/wiki/February_29
[12:04:15] <bob> yeah, that's bad
[12:04:30] <bcotton> #agreed Leap days are real. We will fix Bug 123
[12:04:35] <bcotton> anything else on this topic?
[12:05:35] <bcotton> #topic New business
[12:05:40] <bcotton> any new business?
[12:05:45] <bob> o/
[12:05:50] <bcotton> go ahead, bob
[12:05:55] <bob> just wanted to show an example of raising my hand
[12:06:00] <bob> all done
[12:06:30] <bcotton> Thanks, bob. Anything else?
[12:07:45] <bcotton> Okay, thanks for coming everyone! See you back
here in two weeks for the next meeting
[12:07:50] <bcotton> #endmeeting
[12:07:50] <MeetBot> Meeting ended logs and minutes are in
https://example.com/meetings/example_text_meeting/

```

You may find the best part of text meetings is that you don't need to put any special effort into note-taking. There's no hurried transcription of what people are saying because they're typing it right out for you. And if you're using something like Debian's MeetBot,¹ you get minutes for free. For example, see the minutes from the following meeting example. It's important that you publish meeting minutes in a place where people will be able to find them. This allows your community to use the minutes as a reference in later conversations and actions. Otherwise, whatever happens in the meeting will be quickly forgotten.

1. a. This is an example of what a text-based meeting might look like.
 - b. For a reminder of our meeting procedures & customs, see
 - c. <https://example.com/MeetingEtiquette>
2. Roll call
3. Old business: Bug 123 - Release 1.0 erases all user data when run on a leap day
 - a. https://en.wikipedia.org/wiki/February_29
 - b. AGREED: Leap days are real. We will fix Bug 123
4. New business

Meeting ended at 12:07:50 UTC.

Members present:

1. alice
2. bcotton
3. bob

Text meetings are also great for your robot friends: search engines. The logs and minutes make it easy for newcomers (and potential newcomers) to learn

1. <https://wiki.debian.org/MeetBot>

more about the past of your project. This is a mixed bag, of course. If your project is toxic, then potential contributors will be scared off. If you're worried about that, I suggest putting down this book and fixing that first.

Another great aspect of text meetings is the ability to easily share reference material. Discussing a thorny bug? Share a link. Discussing a glowing review of your latest release? Copy and paste a quote. It's much easier than trying to utter a URL. Think about the video meetings you've been on. Almost all of them have a chat side-channel, right?

Open source project contributors come from all walks of life and all parts of the world. Sometimes this means they're resource-limited. That might mean a lack of bandwidth (including traffic caps), computing hardware, or peripherals. Text-based media tend to be the least resource-intensive, and thus the most inclusive. Consider inclusivity when determining how you'll conduct meetings.

Text meetings also allow people to “multitask.” This is a mixed bag, too. Research has shown that people can't multitask, no matter how well they think they can. But it's also the case that meetings don't necessarily require the full attention of all attendees all the time. You may often find yourself lurking in meetings waiting for something to catch your attention. While you're disengaged from the meeting, you can check email, shuffle paperwork, or do other short tasks that allow you to frequently scan what you've missed.

Of course, text meetings aren't perfect. The low-bandwidth nature that makes them the most broadly available also means that you lose a lot of nonverbal communication. The tone of voice doesn't carry well over text (although the increased use of emoji has helped to mitigate that). You also can't read facial expressions the way you could on a video meeting. That has its upsides (you can go get a cup of coffee or play a game on your phone and no one will notice), but that upside is also a downside. In a video call, you can tell when you're losing your audience—to confusion, boredom, or whatever—but in text meetings you can't unless people explicitly tell you (and they often won't).

Text meetings are also slow. Most people talk faster than they type, which means it takes longer to say the same thing in a text meeting. In addition, some platforms don't indicate when someone is typing, so you end up with a lot of pauses to make sure everyone has had their say.

To mitigate this, you have to set a cultural expectation about how text meetings will work. Since it takes a while for a long sentence to be typed, try asking people who want to say something “raise their hand” (by using o/) or type

some other short indicator. This becomes increasingly important as the number of attendees grows or the time to cover all the agenda topics shrinks.

For text-based meetings:

- *Have a bot take notes.* It's hard to take notes and participate at the same time. A bot will capture everything with great fidelity and can produce minutes for you as well.
- *Pick a platform approachable by your community.* Your community probably has a chat platform already. Use that.
- *Set expectations about signaling intent to talk.* Many chat platforms don't have a typing indicator, so several people may be typing at once. With an agreed-upon signal to indicate intent to talk, you can call on people in turn. This makes the conversation easier to track.
- *Pause before moving on so that others can type.* As mentioned in the previous point, you may not know if someone is trying to type a message. I like to wait 60 seconds between the time I give a "last call" and setting the new topic.

Video Meetings

In the last few years, video meetings have become an inescapable part of life. This was becoming true before the COVID-19 pandemic and has only accelerated since. As computing power (and bandwidth) has gotten cheaper, video meetings have become a more accessible option.

Video meetings feel more connected than text meetings. You see others' faces and hear their voices. With your clothes, hair, and background, you can share a little of your personality. The participants in a video meeting become people, not just letters on a screen.

You get some direct benefit, too. If you're presenting a proposal, demo, or status update, it's much easier to keep everyone in sync with your slides. If you're whiteboarding, you can talk while you use one of the myriad of shared sketching tools.

Of course, video meetings still require a camera, speakers, microphone, and a reliable broadband Internet. These are a given in much of the world, but you can't necessarily assume your project's contributors will have all of them all of the time. Even if they do, they might not be able to use them (for example, if they're at work or in a shared space).

Running a video meeting probably seems more intuitive to you. It is ultimately a loosely structured conversation and most of us have been having conversations since we were toddlers. It's still important to make sure that the chair calls on the person whose turn it is to speak and that speakers indicate they are done. The video aspect helps you notice when someone is trying to speak up but keeps getting talked over.

For video meetings:

- *Ensure participants have the necessary equipment and bandwidth.* To fully participate in a video meeting, a person needs a webcam. They probably need a headset, especially if they're participating in a place where others are around (like their house). When bandwidth is constrained, shutting off the camera often helps, but that removes much of the benefit of having a video meeting.
- *Separate the duties of leading the meeting and taking notes.* It's difficult to participate in a meeting and take notes at the same time. This is particularly true when you're trying to watch for visual cues from participants, keep an eye on the chat, look at the document under discussion, *and* write notes. Even with a large monitor, that's a lot for your eyes and brain to do at once.
- *Share links to presentations or videos so that participants can follow along on their own.* Screen sharing doesn't always work as well as you want. Some platforms aren't designed for retransmitting a video to many recipients. And some participants may need to increase the text size or use assistive technology.

Phone Meetings

Who loves teleconferences? For the sake of completeness, let's cover phone meetings in brief. Let's define "phone" as a spoken medium without video. It may be a traditional telephone service or an Internet-based service like Skype. Phone meetings are an unhappy medium between text and video. People get talked over without any way of trying to indicate who wants to talk. Referring to URLs and visual elements like slides is nigh impossible. Participants who don't speak the same native language may have trouble understanding each other. You don't get the benefits of either of those media (other than the tone of voice). They're not very inclusive unless the service you use has a toll-free number for each country your participants are from. For these reasons, I'm not aware of any open source project that uses phone meetings as a primary form of communication.

But you may find phone calls become more appealing for one-on-one conversations. The phrase “Zoom fatigue” entered our vocabulary during the COVID-19 pandemic as more people began living their entire lives in video conferences. You feel drained after performing for the camera all day, and many people discovered they preferred a phone call instead of a video call. If you’re talking to one other person and want to do it over the phone, go for it.

For phone meetings:

- *Ensure the platform has toll-free dial-in numbers for all participants.* In most cases, toll-free numbers are specific to a country. This means if you have a participant from a country where the platform doesn’t have a number, they’ll have to pay to dial in. International calling isn’t cheap.
- *Ask participants to identify themselves every time they speak.* You probably don’t know everyone’s voice, even if you’ve been in the project for many years. If everyone identifies themselves, it’s always clear who is talking.
- *Call on participants in turn to prevent cross-talk.* When multiple people on a conference call are talking at the same time, it’s impossible to understand any of them. As the moderator, you have to call on people when it is their turn to talk. The challenge here is that the only way people can let you know they want to talk is by talking.