



# openstack®

## OpenStack Hackathon Policy and Guidelines Document

**Event Name: OpenStack Hackathon** \_\_\_\_\_ (enter the name e.g. OpenStack Hackathon Taiwan)

**Event Location** (City, State, Country): \_\_\_\_\_

**Hackathon Date(s):** \_\_\_\_\_

**Pre-Training Date(s):** \_\_\_\_\_

We (your full names) \_\_\_\_\_, \_\_\_\_\_,  
and \_\_\_\_\_, understand and agree to the following:

- We are the main organizers and points of contact for the OpenStack Hackathon Community event referenced above. As organizers we will actively encourage collaboration with other Open Infrastructure communities.
- The purpose of the event must be to educate and inform, NOT to sell products or services.
- Please review the [OpenStack Hackathon website](#). This website contains important information about hosting an OpenStack Hackathon event.
- The intent of the event is NOT to generate a profit. Sponsorships are allowed, but only to cover hard costs of producing the event. Any profit generated from the event is expected to be invested in future OpenStack community events or activities.
- Attendees may be charged a registration fee but the amount must be minimal; less than \$100 USD is strongly recommended. Consider offering special pricing such as early bird registration, diversity and scholarship promotional pricing.
- A minimum of two sponsor companies is required before any event promotion or planning can begin or Foundation financial support can be requested; a minimum of four sponsoring companies for the event overall is highly encouraged. Please provide the following information:

- Sponsor Company #1 Name:
  - Contact Name:
  - Contact Email
- Sponsor Company #2 Name:
  - Contact Name:
  - Contact Email:
- Equal opportunity for sponsorship is required, including competitors of the organizing company. When the number of sponsorships is limited, a best practice is to publish a sponsorship prospectus online on a date known in advance with sponsorships filled on a "first to sign" basis.
- The event should be published and attendance should be completely open to the public, the only restrictions being venue capacity.
- The attendee list may NOT be used for commercial or marketing purposes, only community-building activities, such as sharing event updates or scheduling future meetups. The list will not be shared with third parties who are not directly involved in organizing the event. Please review [OpenStack's Privacy Policy](#) Statement. We recommend you add the following statement to your registration page:
  - “Personal information gathered by the OpenStack Foundation is handled in accordance with the Foundation’s Privacy Policy and is used for internal purposes only. The OpenStack Privacy Policy is available at <http://www.openstack.org/privacy>.”
- In order for the Foundation to gather demographic information, we are asking that you add the following question to your registration page. Please include the responses to this survey question to the Foundation when you send in your final registration list.
  - a.) Number of online registrations, number of participants and number of teams.
  - b.) Organizational Role for each participant:
    - Business Development / Sales / Marketing
    - CEO / Executive Leadership
    - CIO / CTO / IT Manager
    - Cloud Application Developer
    - Cloud Architect
    - Engineer (Systems, Network)
    - OpenStack User / Operator (DevOps)
    - Usability Expert / Tester
    - Upstream Developer
    - Other, please specify
  - c.) Company affiliation for each participant.

- OpenStack Hackathon Working Group: Prior to being approved as an official hackathon (i.e. receiving funding from the Foundation for pre-training), the event organisers must receive approval from the Hackathon Working Group, please contact the co-chairs to receive approval: <https://wiki.openstack.org/wiki/CloudAppHack-WG>
- Hackathon Advisory Board (organisers): In order to demonstrate that this is a community event, you are strongly encouraged to create an advisory committee that consists of at least 4 people from 4 different companies or organizations.
- OpenStack Hackathons Registration List: Please add [Events@openstack.org](mailto:Events@openstack.org) as an administrator for any tools used to organize the event, such as Meetup.com, Eventbrite, etc. so that the OpenStack team can stay informed of all community events, help the organizers when needed, and provide the Foundation with easy access to your registration list. Your registration list should include the attendee name, email, title and company name in addition to the responses to the demographic survey question requested above.
- Due to the twice annual OpenStack Summit and Forum, the term “Summit” may NOT be used in this event’s title or description in order to avoid confusion.
- Press Release policy: If you are planning to issue a press release about your OpenStack Hackathon event, the Foundation requires that you submit your press release at least 5 business days before the target release date for final review and approval. Please submit your Press Release review request to [events@openstack.org](mailto:events@openstack.org)
- OpenStack Hackathon Branding: For legal and trademark reasons, the event must use the OpenStack Hackathon brand properly. The preferred event naming convention is OpenStack Hackathon XXX, where the XXX is the location of your event. Please review and adhere to the branding guidelines described at <http://openstack.org/brand/>. Direct all brand and logo usage questions to [logo@openstack.org](mailto:logo@openstack.org).
- Once event-specific branding assets and logos are distributed, you are expected to use them across all event related printed / digital / social materials and web properties.
- A website (preferred: GitHub) must be created that includes the event information, link to the registration page, and a link to the organizer and sponsor pages. Please submit your URL request to [events@openstack.org](mailto:events@openstack.org) for Foundation review and approval before you register for a new domain name.
  - Event Website URL: \_\_\_\_\_ (e.g. <http://hackathon.openstackgdl.org/>)
- A reliable OpenStack cloud will be arranged that has been tested to meet the needs of the event.
  - Please provide the name of the Public Cloud provider being used for the event:

---

- If you are not using a Public Cloud for this event, please attach a document that details the cloud infrastructure that will be used and how it was tested to demonstrate reliability, particularly

around scaling to the needs of the expected number of attendees.

- If all of the above requirements are met, you are eligible to receive a contribution from the Foundation towards the travel of expert community members to provide training prior to the hackathon. It is the event organizer's responsibility to liaise with the 'Hackathon Working Group' to agree which trainers will be sent at least 45 days prior to the event.

**Accepted and Agreed:**

Signature:

Printed Name:

Email:

Date: \_\_\_\_\_

Company \_\_\_\_\_

Signature:

Printed Name:

Email:

Date: \_\_\_\_\_

Company \_\_\_\_\_

Signature:

Printed Name:

Email:

Date: \_\_\_\_\_

OpenStack Foundation Officer

---

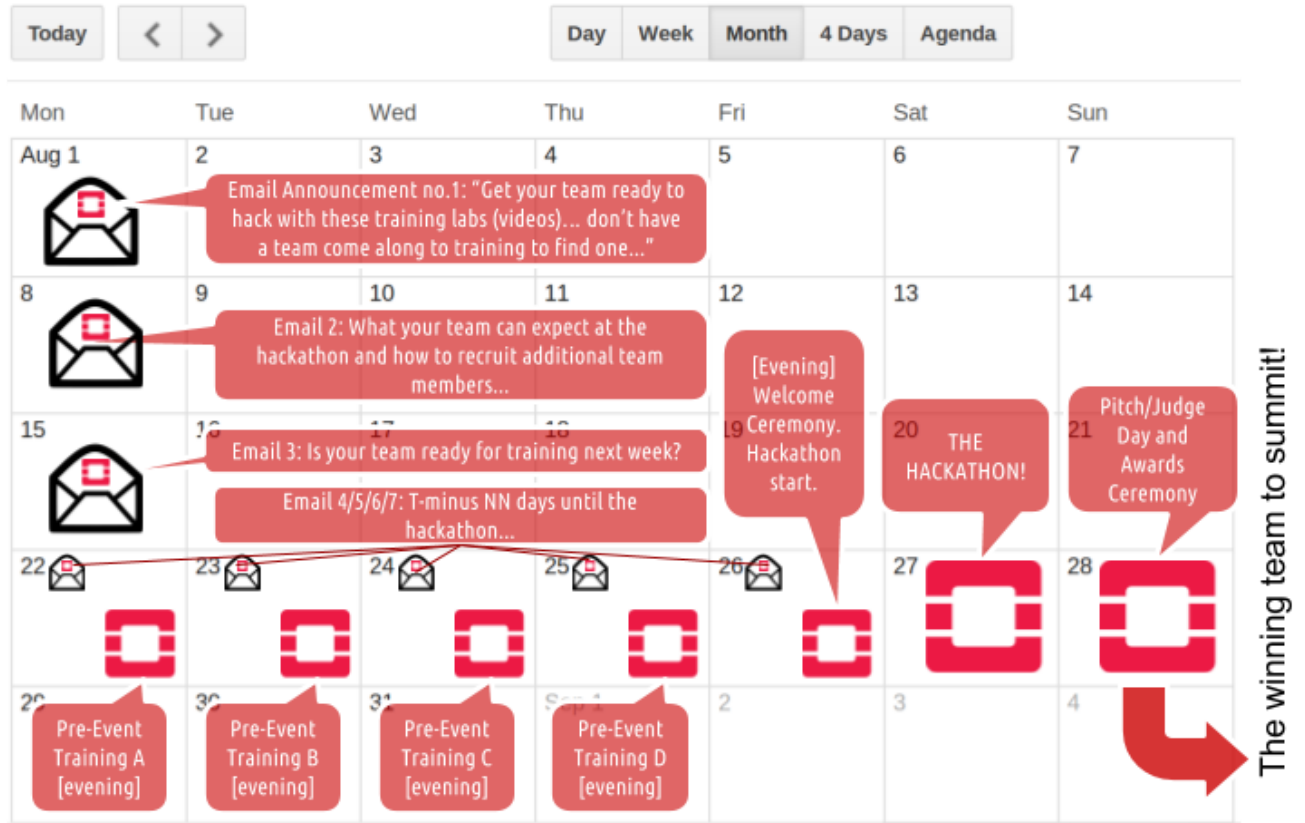
**Please see the following appendices below:**

- Appendix 1: recommended timelines for pre-training and hackathon events
  - Appendix 2: suggested weekly training and hackathon schedule overview
  - Appendix 3: Approval checklist for "hackathon working group"
-

## Appendix 1: recommended timelines for pre-training and hackathon events

Hackathons are team based events which require pre-training activities for teams to prepare. You wouldn't run a marathon without training, nor should you build a cloud application without making sure your team is ready to compete.

When? - suggested timings for pre hackathon announcements / notifications:



Detailed checklists are available as example. A community member who has previously run a hackathon will be introduced to you based on size/shape of your event.

## Appendix 2: suggested weekly training and hackathon schedule overview

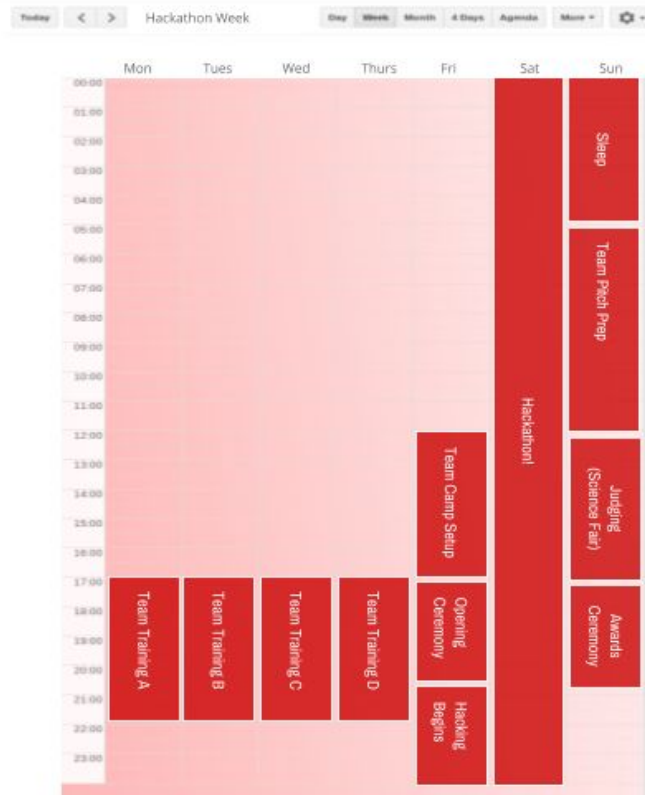
### Pre-Training + Hackathon

Example Team Training:

- Mon: (A) App UX & Design
- Tues: (B) PaaS & CaaS APIs, e.g. OpenShift, Cloud Foundry
- Wed: (C) Cross-cloud SDKs & APIs
- Thurs: (D) Application scaling, i.e. Kubernetes & DC/OS, etc.

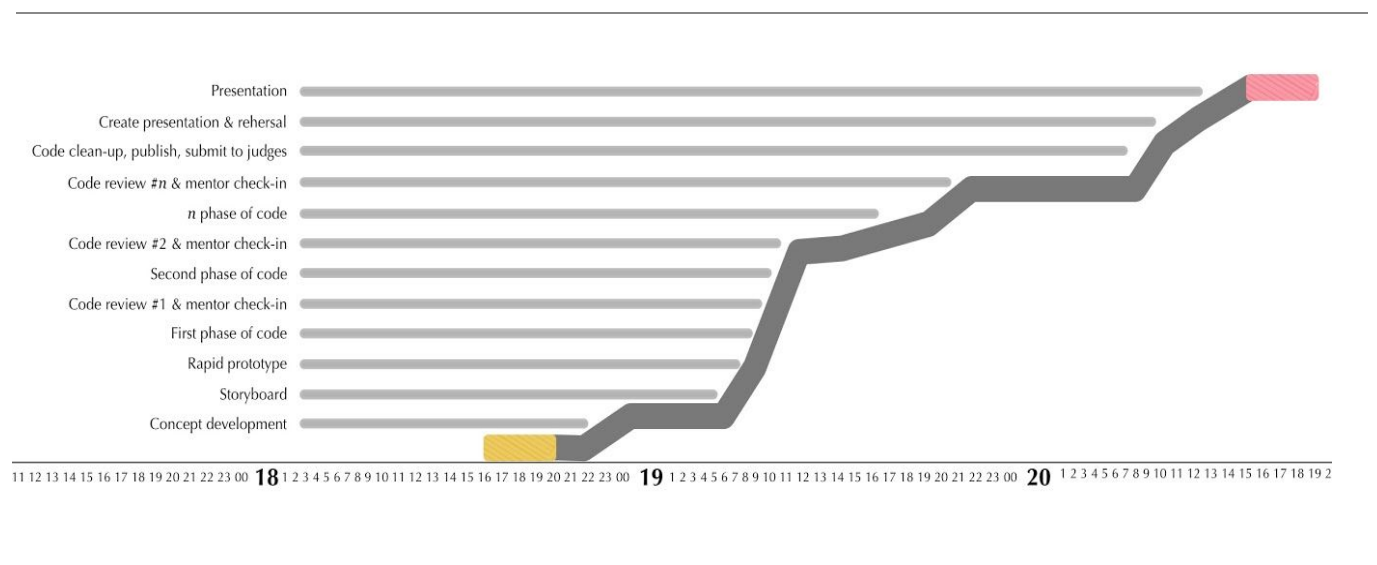
Hackathon Days:

- Fri: Team Camp Setup, Welcome Orientation & Competition Start
- Sat: Hackathon!
- Sun: Pitch prep and competition judging



Sample ‘run of show’ lists can be provided by the community. A community member who has previously run a hackathon will be introduced based on size/shape of your event.

Example of progress a hackathon team should make during the event:



### Appendix 3: Example floor plan for hackathon venue setup



Hackathon Floorplan (Guadalajara, Mexico)

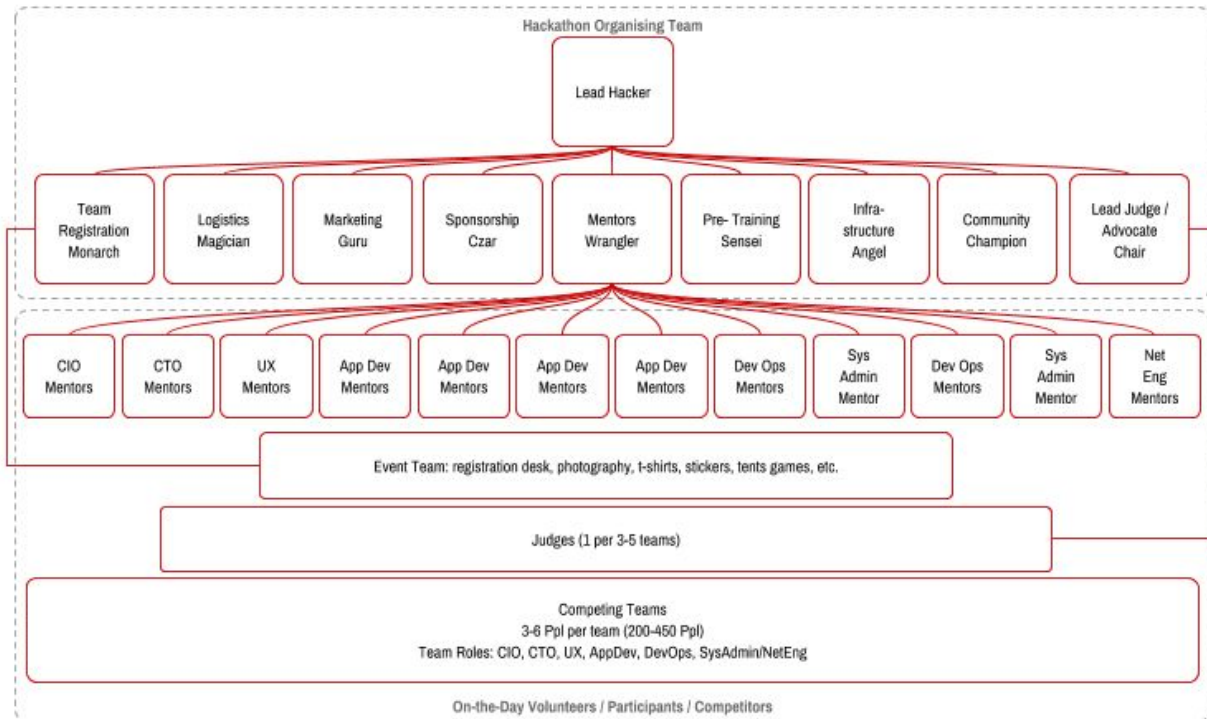
---

### Appendix 4: Approval checklist for “hackathon working group” (pre-event):

- Name and theme of the event.
  - Event timelines, including dates of hackathon and pre-training.
  - Event location, including floorplan.
  - Evidence of different organisations being involved, i.e.
  - A working cloud tested and robust.
  - Evidence of interested sponsors
  - List of event organiser names
  - List of mentors names and their skills
  - Agreed judging process
  - Registration page and website.
  - Approved press release.
  - Required use of #OpenStack hashtag in social media?
-

### Appendix 3: Sample volunteer roles for supporting large hackathon events:

#### Hackathon Volunteer Organisers / Support for +300ppl (50 teams)



For small hackathons the event organisers can be a small dedicated team of two to five people. For large hackathons, *the more help you can get the better*. Having lots of organisers also means inviting participants is easier to achieve. Below is a sample list of hackathon roles and a brief description of a simple task which can be assigned them: “many hands make light work”.

1. **Lead Hacker:** keeping everyone happy and connected, one human hack at a time. Works with ‘sponsorship czar’.
2. **Team Registration Monarch:** recruit and monitor registration processes keeping everyone informed and happy under your benevolent rule. Works with ‘Pre-training Czar’.
3. **Logistics Magician:** venue, catering, food and ambiance are the wand spells you must master. Works with ‘Marketing Guru’.
4. **Marketing Guru:** did the event happen if no one tweeted it?! Works with ‘Registration Monarch’.
5. **Sponsor Czar:** someone needs to make sure things are paid for and prizes given. Works with ‘Infrastructure Angel’.
6. **Mentors Wrangler:** you’ll need to recruit a team of skilled mentors so teams will have additional help to borrow to complete their hack. Works with ‘Lead Hacker’.
  - o Skilled mentors with a variety of expertise: AppDev, DevOps, UX, SysAdmin, NetEng, CIO, CTO, et al.
7. **Pre-Training Sensei:** You can’t run a marathon without training, nor can you cross the finish line of a hackathon. Works with Lead Hacker and OpenStack Foundation to arrange for trainers to be flown in prior to the hackathon.



8. **Infrastructure Angel:** Wifi, Cloud and Power - none shall pass unless a hackathon has these three. Works with 'Logistics Magician'.
9. **Community Champion:** OpenStack is open infrastructure as are several other open communities. Invite them all! Works with 'Marketing Guru'.
10. **Lead Judge Advocates:** bring together a group of individuals who have the experience and gravitas to pick the best winners. Works with 'Sponsorship Czar'.
  - Judges xNN = you'll need one judge for every 5 teams.