Team Standards Document

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Overview

The purpose of the Team Standard Document (referred to as TSD from here on) is to create a foundation for team operations. It serves as the constitution of the team and is the document which outlines the methods for settling conflict, details the processes for recourse and punishment, and establishes team standards and expectations. While the processes, methods, standards, and rules here are binding for the team, this document may be revised and is, in this sense, a living document.

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Section 1 *Basic Agreement Rules*

Article 1.1 [TSD Universal Agreement Clause] - The team standards document is binding for all team members and serves as the contractual agreement and statement of consideration between participating team members. All members, by associating with the team, agree to be bound by the rules stated herein and are subject to all, but not limited to, the legal processes, methods of conflict resolution, resource decisions, and other team agreements stated in the document.

Article 1.2 [Revision Requests] - All processes in the TSD are subject to change and may be revised at any point by requesting a team meeting. The requester of the amendment to the TSD must contact the team lead and allow for **3 business days** from the time of request for the team lead to arrange a time and place for the team discussion and vote.

Article 1.3 [TSD Revision Clause] - To change any part of this document, the team must pass the proposed amendment by a majority 3/4ths vote, or a ratio of team members that is greater than or equal to 75 percent.

Article 1.4 [Decision Making] - Any team decision must be made with a majority 3/4ths vote, or a ratio of team members that is greater than or equal to 75 percent.

Article 1.5 [Ex-Post Facto Clause] - All amendments to the TSD are not retroactive and take effect at midnight on the day that the amendment was passed. No rule, standard, penalty, or process passed or amended may hold accountable a member of the team for past actions that in the new amendment would constitute a penalty or otherwise negatively impact the member.

Section 2 *Team Roles*

Article 2.1 [Basic Agreement] - All team members are to be held accountable for responsibilities regarding their roles. Failure to follow these articles could lead to actions defined in section 5.

Article 2.2 [Role Changes] - All role assignments are subject to change. In order to change roles, a request must be brought to the team lead. At the time of notification, another team member must be available and willing to take on the position as arranged independently by the person who wishes to change their role.

Article 2.3 [Role Assignments] - The following are the roll descriptions and assignments for the team:

Team Lead - Joshua Johnson
The team lead is responsible for, but is not limited to, facilitating communication between team members, ensuring the rules and standards put forth in the TSD are honored, updating the team on major customer or faculty communications, and for generating a formal weekly task report representing current project progress. A team lead is also accountable for communicating with the customer and NAU faculty to coordinate meetings, deadlines, and other important correspondence.

Release Manager - Joshua Johnson
The release manager is responsible but not limited to maintaining and updating the repository, accepting pull requests, and for creating issues in the project management software.

Editor - Joshua Johnson
The editor is responsible for proofing all documents before release which includes but is not limited to ensuring proper formatting, design, and content written work.

Recorder - Silu Shen
The recorder is tasked with creating and maintaining the weekly meeting notes and uploading these notes onto the shared team folder on Google Drive.

Architect - Tristan Miller
An architect is accountable for checking that system designs are followed, ensuring that requirements are met by the implemented code, and reviewing the quality of implemented systems in relation to designs.

Coder - Zane Fink (Web Development)

A coder is responsible for implementing the solution to the problem as outlined in the requirements document. While a coder is responsible for assisting with all the code necessary for project completion, a coder may choose to focus in a specialized area in addition to these contributions.

Section 3 *Team Meeting Expectations*

Article 3.1 [Basic Agreement] - All team members, by being a party to this contract, agree to make a good faith effort to attend all team meetings. If attendance issues arise as outlined in this document, every team member agrees to have levied upon them the processes and possible penalties as stipulated in this document.

Article 3.2 [Meeting Times] - All team members agree to meet at the following times: **Mondays at 2:30 to 3:30 p.m.** and **Fridays** after class, unless stated otherwise.

Article 3.3 [Attendance Agreement] - All team members agree that each party to this contract has **exactly 3** absences allowed over the course of the year. These absences cannot be used if an absence would otherwise leave a meeting unrepresented.

Article 3.4 [Notice of Absence] - If a team member is going to be absent, they must notify the team no later than 30 minutes before the meeting.

Article 3.5 [Breaking Attendance Agreement] - If a team member exceeds the threshold of allowable absences for reasons not covered in *article 3.4,* they agree to be subject to any or all the following processes which may be applicable and reasonable for the circumstance:
1. Notification of attendance agreement breach by team lead.
2. An appropriate penalty to the weekly task report as determined by the team.
3. An appropriate reduction of the team member's contribution to the team in peer evaluations as determined by the team.
4. Firing procedures as dictated in this document levied against the team member.

Article 3.6 [Emergency Situations] - If the attendance agreement as stipulated in *article 3.2* is broken for any reason due to an emergency such as *poor health of a family member, personal injury, extreme personal illness,* or any other emergency which is deemed appropriate by the team, the offending party will not be held accountable for the attendance agreement breach.

Article 3.7 [Meeting Standards] - Any meeting with NAU faculty or project clients must be treated with professionalism. This includes but is not limited to dressing appropriately and having professional conduct. For team meetings which exclude NAU faculty and project clients, an air of professionality must still exist.

Article 3.8 [Agenda Structure] - Each member is responsible for providing a short document in the team folder on Google Drive before each meeting detailing their progress and work that week. Each meeting will consist of the following in a flexible order:

- A team discussion on progress.
- Issue reviews and assignments.
- Product designs and/or document reviews.

Article 3.9 [Meeting Minutes] - Each meeting, the minutes recorded therein will be written in a Google document following the conventions and formatting of the template for meeting minutes in the shared team folder.

Section 4 *Tools and Document Standards*

Article 4.1 [Basic Agreement] - All tools, resources, and the natural process to use them, as agreed upon by the team in this TSD, must be upheld and consistently updated to reflect project velocity, progress, and team contributions.

Article 4.2 [Repositories and PMS] - Team GenTest will use, for the duration allocated to the project effort, *Github (https://github.com/)* to manage project issues and track code. This includes committing appropriate code changes to the repository, using pull requests for quality reviews, and updating issues with appropriate links to committed changes.

Article 4.3 [Development Workflow] - All development on the codebase must performed as dictated in the Development Workflow Standards document in the team shared folder on Google Drive.

Article 4.4 [Tasks and Issues] - Team members must accurately record and keep track of work in progress, assigned work, and completed work using the *Github Issues* project board. This board must be updated at least before the end of each week and preferably every time work is done on a specific issue.

Article 4.5 [Documents] - Documents must be created in the shared Google Drive team folder and must reflect current work on all assigned issues. If documents need to be distributed, the primary file format must be **PDF**, and the method of delivery for all inside releases must be **Slack.**

Article 4.6 [Outside Document Development] - Documents may be, if decided by the writer, created in another text editing software. A corresponding document must be included as a Google document in the team shared folder on Google Drive at and no later than the time of starting work. The quality and formatting of a document developed outside of specified file formats must be equivalent to that of what is created by the team in Google Docs and must be easily imported into this format. Additionally, all changes made to the document outside of Google Drive must be updated frequently to the corresponding file in the shared team folder.

Article 4.7 [Document Formatting] - Documents created must follow the same formatting conventions as discussed and agreed upon by the team and as represented in the templates folder of the shared team folder.

Article 4.8 [Document Delivery Deadlines] - All documents which are due at the next mentor meet (Mondays) will be finished by midnight on the Friday before the deadline. These documents must be representative of the quality of a final draft, but are not expected to be completely perfect.

Article 4.9 [Document Review] - Once documents have been delivered at the time specified in *article 3.7*, each member has the right and responsibility to review and edit any spelling, formatting, or content errors. If a major concern is found which would otherwise alter the process which is used normally for documentation, it must be brought to the editor for review and the team must be notified of the concern.

Article 4.10 [Presentations] - Presentations must be made using Google Slides and should be worked on and placed in the team shared folder on Google Drive.

Section 5 *Conflict Resolution*

Article 5.1 [Basic Agreement] - Failure to follow any other sections in this document could lead to actions defined in this section.

Article 5.3 [Action Progression] - Depending on the severity of the situation, one or all of the actions could be put in place, as well as skipping steps of the action flow. The order for which actions will be as follows:

1. Verbal Warning detailing the issues at hand.
2. A meeting with offending parties to discuss potential remedies.
3. A team meeting to restructure, to better suit the offending parties strengths/weaknesses.
4. Escalation of the issue to team mentor, and potentially the professor.

Article 5.4 [Non-Performing Team Members] - A team member may be considered non-performing upon failure to complete weekly tasks more than twice in a month. Note that due to the nature of working with new technologies and frameworks some tasks may take substantially longer than the time they were initially allotted. It is expected that a team member that is experiencing difficulties will: a) actively communicate their difficulties with the rest of the team, and b) communicate what has been done to fix the problem, and what is planned next. This allows the entire team to help troubleshoot. If this situation arises, the team will hold a vote to exclude the team member from being considered non-performant.

A team member who has been deemed non-performing will first receive a warning from the team in the form of an email detailing the reason for being marked as non-performing. Additionally, the issue will be discussed in a team meeting that includes neither the team mentor nor the team sponsor. The purpose of this meeting will be to communicate with the non-performing team member and to come up with a plan to improve performance. This plan will take the form of an email sent to each of the team members. Upon the second occurrence of a team member being marked as non-performing, a second email will be created notifying the team member of their repeated offense. Another email will be sent to the team mentor containing all previous emails that have been exchanged regarding this team member's performance. A new plan will be created at the next meeting with the team mentor.

A team member who has been determined to be non-performing three times will be terminated.

Section 6 *Team Reflection*

Article 6.1 [Basic Agreement] - All team members acknowledge that team retrospectives will be held and that each member is expected to put a good faith effort into genuinely reflecting upon personal and team performance.

Article 6.2 [Retrospective Expectations] - All members are expected to bring with them a document detailing some talking points for the team reflection. This document must represent a good attempt to reflect upon team dynamics, performance, and systems. Questions may be asked about points presented on the sheet, so a good understanding of items listed is preferable. As this document will be internal only, it does not have to be perfect, as long as the information is presented in a readable fashion.

Article 6.3 [Retrospective Times] - The team will hold reflections every other meeting at the beginning of the meeting.