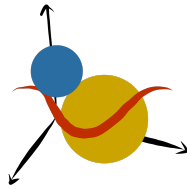


# Team Standards

September 16, 2020

Team Triaxis



**Sponsors:** Dr. Will Grundy , Dr. Audrey Thirouin

**Faculty Mentor:** Sambashiva Kethireddy

**Team Members:** Eleanor Carlos, Reyna Orendain, Andres Sepulveda, Brandon Visoky

# Introduction

This document is to serve as a guideline for the roles and responsibilities our team will be taking on during the course of its lifetime. In particular, this document will provide information on members' assigned roles, protocols for conduct, and communication amongst the team and clients, as well as agreed tools the team will utilize.

## Roles and Responsibilities

For the successful completion of capstone, it is important to have well-defined roles for each member of our team to ensure that everyone shares responsibility equally. May this section serve as a description of the roles we will be taking in this group, and which members are assigned to each role.

Description of Roles	
Description	Assigned Role
<b>Team Leader:</b> Coordinates task assignments, ensures work is progressing, runs meetings, and makes initial efforts to resolve conflicts	Andres Sepulveda
<b>Customer Communicator:</b> Coordinates and conducts customer communications	Andres Sepulveda
<b>Recorder:</b> Maintains detailed meeting minutes in activity log	Eleanor Carlos
<b>Architect:</b> Is primarily responsible for ensuring that core architectural decisions are followed during implementation	Reyna Orendain
<b>Release Manager:</b> Coordinates project versioning and branching, reviews and cleans up commit logs for accuracy, readability, and understandability, and ensures that any build tools can quickly generate a working release	Brandon Visoky
<b>Quality Assurance:</b> Is the final set of eyes on any deliverable/release, ensuring that it is in an acceptable state and is ready to be delivered to the client	Eleanor Carlos Brandon Visoky
<b>Coder:</b> Has a role in producing code for the project; each member will participate as a coder on this project	Andres Sepulveda Eleanor Carlos Reyna Orendain Brandon Visoky

# Team Meeting Expectations

This section will serve as a list of general meeting expectations and guidelines.

## Meeting Times

As discussed by the group, we have concluded that the best time for weekly team meetings will be:

- ❑ **Regular Meeting Time:** Mondays 7pm-8pm
- ❑ **Backup Meeting Time:** Thursdays 7pm-8pm

## Agenda Structure

This structure will provide the steps for a productive meeting between team members, with flexibility in each session as seen fit by the team. This will hopefully cut down on any rigidity and will invite more open thought and communication among team members.

1. Come to each meeting after filling out a templated progress report via Google Slides.
  - a. What We've Worked on
  - b. What We Need to Work on
  - c. Any Blockers?
2. Discuss each member's progress over the week, and discuss anything that did or did not go well.
3. View Trello board and discuss upcoming projects, assigning tasks for each card.

## Minutes

Minutes will be taken in the activity log hosted in the team folder for regular meetings between team members. There will be a more formal, separate, document for minutes taken with the mentor and client.

## Decision-Making Process

In cases of disagreement among group members in any capacity, whether it be with documentation or implementation, it will be settled via majority rule. In the case of our group of four, we will need three members to come to a decision. In situations where all members are not available, the majority ruling of the present members will suffice.

## Attendance and Conduct Standards

**SUMMARY:** Life gets in the way sometimes - COVID-19 only compounds this fact and creates additional stress on all of us. By defining standards of attendance and general conduct, as well as a process to address those who aren't meeting the standard, we are fostering a team that will thrive and perform

efficiently throughout the Capstone Project. The goal is to never have to use this system if we (the capstone team) properly communicate with each other and treat each other with respect and dignity.

## **DEFINITIONS:**

**Corrective Action:** Any disciplinary action taken against a member of the team for the purposes of maintaining a productive and professional environment. Corrective action escalates only within the confines of a particular category (e.g. missing a meeting then missing a deadline would constitute two informal corrections for attendance and deadlines, respectively).

**Excused Absence:** All members of the team are expected to communicate any last minute scheduling conflicts at least 24 hours in advance, when possible. All excused absences and time conflicts will be recorded and documented by the team lead for future reference. The team leader has the right to determine whether an absence is excused on a case by case basis, with a final decision being made by the Capstone mentor in the case of disputes.

**Unexcused Absence:** Any absence not considered 'Excused' by the team lead is 'Unexcused.' Typically these absences are caused by a lapse of judgement or otherwise poor-time management or communication. In the real world, consistent unexcused absence would result in immediate termination from a position.

**Normal escalation:** Normal Escalation means that corrective action will occur in the order presented below. Much of this is adapted from the "CS Capstone: Policy and Process for managing non-performing team members" document created by Dr. Eck Doerry, which is available on the CS476 website under 'Info and Policies.'

### **a. Informal Correction**

- i. The team lead will reach out to the member of the team and address the concern either verbally or by text / Discord message. The focus of this conversation is to identify the problem and come up with a solution, especially if the problem stems from an issue in team standards, communication, or organization. The team lead is responsible for ensuring that a solution is identified and implemented in a timely manner.

### **b. Formal Verbal Counseling**

- i. The team lead will schedule a call with the member to address the concern. If an Informal Correction was given previously, the team lead will reference that correction and the proposed solution. Emphasis will be placed on the importance of adhering to standards **within a team environment.**

### **c. Letter / Memo of Counseling**

- i. If a particular team member continues to perform poorly, then a formal corrective action is justified. This begins with a formal memo to the offending member from the rest of the team, with a copy CC'd to the team's mentor and the CS Faculty Capstone organizer. The memo must be formal, completely professional, and should focus very clearly and specifically on the performance failures in question. An outline of what constitutes this letter or memo can be [found at the following link.](#)

- ii. Upon receiving a letter / memo of counseling, the team member in question has 24 hours to reply with a formal response memo. Upon receiving the CC of the formal memo, the Capstone mentor will generally follow-up by sending an email to the member in question, containing the link to the disciplinary policy ([linked above](#)). This email will state unequivocally that this is a serious situation, and that failure to respond formally and promptly will result in further disciplinary action, including expulsion from the Capstone course with a grade of F. An outline of an acceptable response memo from targeted party can be [found at the following link](#).
  - iii. The team mentor reviews the response. If it is found to be lacking, he or she may be asked to revise the memo. If the response memo appears to address the problem areas, no further action is required.
  - iv. If behaviors change and the problem is resolved, then the matter is forgotten. **What this means is that the other team members should act like complete professionals** -- there is no room for leftover grudges. If the performance comes up to snuff, then it's over and everyone is happy.
- d. **Mentor / Faculty Organizer Counseling**
- i. If behavior does not change, or the disciplined team member fails to fulfill one or more commitments made in their response memo, the remaining team members should schedule a meeting with the Capstone Mentor / Faculty Organizer. At this meeting, the performance failure will be reviewed and an appropriate response will be crafted. The department chair may be invited to sit in on this meeting as well, to offer an opinion, and to sanction any disciplinary action that is decided on. If it is decided that no further chances for improvement should be given, then the faculty member or department chair formally notifies the disciplined team member that s/he has been fired and is dismissed from the course.

## PROCESS:

The team lead is responsible for recording and maintaining all documentation for corrective action throughout the duration of the project. If the team leader administers corrective action to a member of the team, they are responsible for notifying the Capstone Mentor and providing details on the correction not later than (NLT) 72 hours of the corrective action being administered. All corrections will follow the normal escalation as defined when applicable.

The first step in identifying the proper procedure for applying corrective action is understanding the different avenues required for different areas of interest. The next step involves identifying which citation / step is appropriate for the corrective action administered. Within each area of interest is a given set of rules for the appropriate escalation of corrective action, whether it be normal or abnormal.

Abnormal escalation will depend on the form of conduct that is violated. Situations that involve external organizations (NAU Campus Health Services, NAUPD, etc.) will be immediately brought up to the Capstone mentor / Faculty Organizer. Any abnormal escalation of corrective action by the team lead must be cleared with the Capstone Mentor BEFORE any corrective action is administered.

## **ATTENDANCE:**

As defined above, all members of the team are expected to communicate any scheduling conflicts at least 24 hours in advance when possible. Corrective action is warranted whenever any member of the team is absent to any scheduled meeting without either proper notification to the team lead or without extenuating circumstances. The normal escalation for an unexcused absence (UA) is as follows:

- 1 UA: Informal Correction
- 2 UA: Formal Verbal Counseling
- 3 UA: Letter / Memo of Counseling
- 4+ UA: Mentor / Faculty Organizer Counseling

## **CONDUCT:**

Corrective action is warranted whenever a member of the team displays poor judgment that negatively affects the team and/or project. An example of misconduct would include failing to maintain a proper relationship with other members of the team (i.e. being unnecessarily strict or negative with a member of the team and not promoting / maintaining a productive, professional atmosphere).

Conduct Violations (CVs) are vastly different in complexity, and abnormal escalation may be deemed necessary. Any abnormal escalation of corrective action by the team lead must be cleared with the Capstone Mentor BEFORE any corrective action is administered.

A normal escalation of corrective action for CVs is as follows:

- 1 CV: "Heads Up"
  - Any member of the team can give any other member a "Heads Up," which is essentially an informal notification either verbally or by written correspondence that something the member is doing is negatively contributing to the team or the issuing member.
    - The member issuing a "Heads Up" should address this professionally and positively, in a way that encourages discussion and a solution, rather than abrasiveness or disregard.
    - Proper documentation of date / time and the points discussed is encouraged to ensure proper corrective action can be taken in the event behavior is not corrected.
  - Example situations might include: Stepping on a assignment lead's toes, making unprofessional comments, talking over someone consistently / maliciously,
  - Any further conduct requiring disciplinary action should be routed through the team lead for a Formal Correction, however additional "Heads Up's" may occur at the discretion of the issuing member. It is highly recommended no more than two "Heads Up's" occur before escalation to a Formal Correction
- 2 CV: Formal Correction
- 3 CV: Letter / Memo of Counseling
- 4+ CV: Mentor / Faculty Organizer Counseling

## MISSED DEADLINES:

A missed deadline is defined as a timeframe previously outlined on Trello by the team lead that any member of the team did not complete a task within without properly communicating the need for an extension or reassignment of tasks. It is highly recommended that extensions or reallocation of tasks are pursued by any team member when extenuating circumstances occur at least 24 hours in advance when possible.

Missed deadlines (MDs) will follow the normal escalation of corrective action:

- 1 MD: Informal Correction
- 2 MD: Formal Verbal Counseling
- 3 MD: Letter / Memo of Counseling
- 4 MD: Mentor / Faculty Advisor Counseling

## AMENDMENT OF STANDARDS:

In the event any standard must be amended, the team lead will present the proposed amendment to the team at the next available meeting time. A  $\frac{3}{4}$  majority vote is required for any amendment of policy to take effect.

# Tools and Documentation Standards

## Version Control

To maintain the codebase for our capstone project, the team will be using a public GitHub repository found [here](#). Only members and authorized users will have access to commit and make any changes to the repository.

## Issue tracking

Issue tracking in this team will be located in two separate locations depending on their context.

- ❑ All **code** based todos, bugs, and feature requests will be hosted and tracked on our GitHub repository's Issue Tracking page, located [here](#).
- ❑ All **other** todos, tasks, and assignments will be hosted and tracked on our Trello board, located [here](#).

This should be used to create a clear distinction between the two kinds of work, the Trello board being largely reserved for important due dates and more broad assignments.

## Word Processing and Presentation

The main location for any documents and presentations for this group will be hosted on a shared Google Drive folder. Any other kind of documentation that cannot be created through Google Drive will still be hosted/uploaded to the drive.

## Composition and Review

For any larger documents/deliverables, the process for integrating and assigning different parts of the deliverable will be decided on a case-by-case basis. The different parts of any deliverable will be thoroughly listed out on the relevant Trello ticket. It is expected that any given deliverable will be completed and passed along to the relevant Quality Assurance member for final checks and consistency 24 hours prior to the final deadline.

## Response Time

It is important to establish a standard for expected response times within the group so that all members can work more efficiently as a team. In general, team members should make yourself available from 8am-5pm on weekdays. Responses before and after these times are not and should not be expected. If possible, team members should check Discord for new messages at least twice a day. If this is not possible, team members must respond within 48 hours at the latest.

## Team Self Review

Team self reviews will be conducted once at the end of every month as an activity during the group meeting. These will be done via a "Hot Seat" system, where each team member will be given positive/negative feedback in turn. This is to promote healthy and regular communication between group members. All members must agree to provide constructive and non-personal feedback.

Good feedback will include questions along these lines:

- How are they doing with their work?
- What is the quality of their submissions?
- Responsiveness?
- Professionalism?

Bad feedback, such as any attacks/comments based on personal/physical features, is not permitted.