The ER Publications Team

Team Charter

Overview

The ER Publications Team is a self-directed work team comprised of CIC-1 technical editorial, design, and production staff supporting the ER Project at Los Alamos National Laboratory. Most traditional team leadership duties are shared by its members; no supervisor is involved in the team's daily operations, such as work intake and project management. The team also has significant input into its membership.

The charter describes the team's mission, values, role distribution, and work procedures.

Mission

The team's mission is to assist ER technical staff members with communication by providing clear, accurate, high-quality deliverables that document the project's work in a timely manner, adhere to DOE and ER guidelines, and add marketing value for the project.

Values

Team members are committed to a set of values and related behaviors they will follow when dealing with each other, customers and managers. By their examples they hope to encourage others to treat them the same way. The values:

Value	Behaviors
Respect/Trust	Make requests specific; solicit and consider advice; include team members in meetings as part of project teams; be polite; follow author's guidelines; provide needed tools and equipment; expect process and document changes
Friendliness	Speak civilly; keep sense of humor; "ask" instead of "tell"

Value	Behaviors
Realism	Recognize and use individuals' roles and skills; accept constraints of process; accept human limits; meet your deadlines, or accept that subsequent deadlines may have to change
Interface Improvement	Communicate the value in our work; explain and use levels of edit; conduct lessons-learned reviews and apply lessons

Roles

Team members have defined and will distribute the duties performed by a traditional team leader as follows.

Role	Duties	Assignment
Facilitator	• Attend project-wide meetings as team representative • Schedules meeting rooms • Creates meeting agendas • Conducts meetings • Investigates charter violations as per the "Discipline" procedure	Rotate every two weeks, at end of second meeting
Scribe	• Creates meeting notes, distributes by the Monday following each meeting • Creates reports to managers, distributes after approval by the Monday following each meeting • Serve as backup to facilitator	Rotate every two weeks, once duties from second meeting are complete; scribe then becomes facilitator

Role	Duties	Assignment
Mediator	• Attempts to resolve disagreements among team members • Under the "Discipline" procedure, documents findings if unable to broker a resolution, and contacts the CIC-1 project leader for assistance	1) Under "Disagreements" procedure, any team member 2) Under "Discipline" procedure, the facilitator at the time the issue is raised
Compositor	• Manages document files and version control • Performs electronic formatting and revisions • Ensures conformity to applicable guidelines and formats • Inserts figures, photographs, and tables • Troubleshoots cross-platform and cross-application problems • Creates tables of contents • Archives	

Role	Duties	Assignment
Editor	• Edits all types of documents • Writes portions of documents for which the editor has adequate background (as determined by customer) • Manages document files and version control • Works closely with illustrators and compositors • Works with technical team members to clarify information, incorporate comments from reviews, etc. • Knows and follows DOE- and project-mandated formats and LANL publications policy and procedures	

Procedures

Hiring

Under CIC-1 policy, team members likely to work with a new team member should be included on the hiring team for that member. After the hiring team decides on a recommended candidate, and before sending that recommendation to the CIC-1 project leader (and customer, if the customer wasn't on the hiring team):

1) The involved team members present information on the candidate to the team

2) Members provide input, but do not make a formal recommendation on the candidate

3) The scribe creates a report recording the team's input, and hiring team members include the report with the hiring materials submitted to the PL

Meetings

The team holds mandatory meetings of at least one hour each week. By "mandatory," it is understood that team members will account for the meeting times in project schedules and when scheduling other meetings, giving team meetings top priority if at all possible. All meetings start and end on time. The procedure follows.

1) The facilitator schedules rooms based on the schedule chosen by the team

2) The facilitator creates the agenda; the standard format is:

    o   Review/correction of the previous meeting's notes
    o   Approval of managers' report
    o   Review of schedules and workloads
    o   Old Issues—responsible person (for action items due) or requestor (for new issues) leads discussion
    o   Identification of new issues

3) The facilitator distributes the agenda no later than 24 hours before the next meeting

4) The facilitator conducts the meeting according to the following rules:

    o   Everyone is equal
    o   One conversation at a time
    o   No backtracking
    o   Silence or absence equals agreement

5) The team attempts to build consensus behind each decision. During discussions, the goal is for each member to be able to say to him- or herself, in order of preference:

    o   "I agree."
    o   "I disagree, but will go along."
    o   "I think this is a mistake, but I will support the team."

6) If consensus cannot be reached:

    a) The facilitator tables the discussion until the next appropriate meeting given any deadlines on the decision (if possible), assigning action items to gather more information if needed.

    b) The discussions continue until the deadline is reached or the team decides consensus cannot be reached.

    c) A secret vote is taken, with the facilitator counting the ballots. She or he announces the decision, but not the vote tally.

7) All decisions are accompanied by the assignment of action items with due dates and responsible parties identified

8) By the Monday following the meeting the scribe distributes:

   o The approved managers' report reviewing decisions made and relevant action items to the deputy program manager and CIC-1 supervisor

   o Corrected previous meeting's notes, and draft notes from the most recent meeting, to the team, covering: the basic meeting topics, discussion points, decisions made, and all action items

Publication Process

1) Author(s), editor(s), and compositor hold a planning meeting at which the following are determined:

   o Schedule (milestones)—see attached sample schedules

   o Projected length and scope of document

   o Authors, with contact information and responsibilities

   o Type of document, including required format if any

   o Number and sources of figures, and who will revise them

   o Driver behind document, e.g. performance measure

   o Medium (paper, CD, Web, etc.)

   o Format for revision (electronic or hardcopy, with figures integrated or not)

2) Authors prepare and submit materials according to author's guidelines

3) Editors revise text, compositors revise figures

4) Materials submitted to author and to S-7 for classification/legal review

5) Author conducts first review and returns comments

6) Editors and compositors incorporate changes and return for further review, work with authors until document is ready

7) Compositor completes final composition

8) Compositor produces copy for DOE Review

9) Authors, editor, and compositor determine and incorporate changes

10) All reviewers sign signature form as S-7 completes second review (if S-7 requests one)

11) Production staff creates and distributes copies, including S-7 copies

12) Editor arranges archiving

Disagreements

If two or more team members have a disagreement, whether professional (e.g. editing style) or personal (e.g. a personality clash), and they cannot resolve it, they will:

1) Refer to written resources for guidance:

   o Planning meeting decisions
   o Author's guidelines
   o Team charter
   o ER Project guidance
   o Lab guidance

2) If those resources provide no clear answer:

   o For personal issues, contact the CIC-1 project leader for mediation
   o For professional issues, select another team member to mediate and continue to the next step

3) Meet with the mediator and attempt to achieve consensus on a resolution to the disagreement. If that isn't possible, do either or both of the following:

   o Distribute the question via a-mail to the team for comments, and attempt to achieve team-wide consensus
   o Contact the facilitator to address the issue in a team meeting

Discipline

Anyone experiencing or witnessing a violation of this charter has the right to bring it to the attention of the facilitator. That person—called the "mediator" in this procedure—will complete the following procedure even if not finished before the facilitation role rotates to another team member.

1) The mediator gathers all relevant information from the involved parties and any witnesses

2) The mediator attempts to mediate a resolution of the matter among the involved parties

3) If the mediator cannot broker a resolution and determines there was a violation, but the alleged violator does not agree, the mediator documents his or her findings

4) He or she gets signatures from the involved parties; if someone disagrees with the findings, that person should still sign to

acknowledge awareness of the matter, but may add comments to the documentation

5) The mediator gives the documentation to the CIC-1 project leader and requests action, giving copies to the involved parties (but not keeping a copy)

Removals from Team

If a team member believes another member is not fitting in with the team, based on multiple instances of the Disagreements and/or Discipline procedures being invoked:

1) The team member may informally and discreetly ask other members if they agree; members will not pass this information along to the problematic member if so approached

2) If the other members agree, two or more will request a meeting with the CIC-1 project leader (PL) and explain their concerns; if not, the originating member retains the right to express his or her concerns to the PL

3) If the PL indicates no steps are being taken to end the problems, the members should call for a special meeting of the PL and all members of the team

   The PL agrees to attempt to broker resolution of the problems, and if unable to do so, to arrange for the problematic member to be removed from the team