

Team Leader Responsibilities Policy

Version 1.0

Article 1. Introduction. This document sets out the responsibilities of a Team Leader of a Team or Working Group of Joomla! and aims to provide a helpful resource to assist them in their role. For clarity we have chosen for a bulleted format rather than a verbose description.

Article 2. Responsibilities.

Organisational

- Read all board reports and motions to keep informed about changes that may affect the team, any queries to be discussed with the Department Coordinator
- Organise monthly meetings at a minimum, and bi-weekly meetings where necessary, unless agreed otherwise with the Department Coordinator
 - Define a regular schedule for team meetings, taking into account the differing time zones of team members
 - Prepare an agenda at least 7 days in advance of the meeting so that team members can populate it in the days preceding the meeting
 - Send out Google Calendar invites for the meeting at least 7 days in advance to the team's Google Group
 - Hold the meeting using Google Meet for audio/video meetings or Glip for text meetings
 - Write up meeting minutes and following the team's approval, post them on the reporting section of the team's profile on the Volunteer Portal within a few days of the meeting
- Attend the department meetings
 - Populate the appropriate section in the agenda at least 24 hours before the meeting, for all information available at that time
 - Raise any queries or discussion points from the team
 - For any significant or critical information, do not wait for the meeting and instead notify the Department Coordinator immediately
 - If the Team Leader cannot attend the meeting, the Assistant Team Leader should attend instead
- Prepare and submit a yearly budget for the team to Department Coordinator ahead of the financial year (July - June), listing the known fixed expenditures (e.g. service renewals), projected incomes (e.g. sponsorships) and expenditure requests (e.g. holding a team sprint)
- Organise budgetary spending; must be approved in advance by Department Coordinator
- Plan and organise any eventual team sprints or attendance at events
- If any motions are to take place:
 - The motion must be seconded by a team member before voting can commence
 - All motions to have three options for voters: For, Against, Abstain
 - Once seconded, voting can take place in one of the following ways:
 - During a team meeting, if the motion is present on the agenda at least 24 hours before and a majority quorum (greater than 50%) of team members with the right to vote is present or via proxies

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- Outside of a team meeting to be conducted over email with a maximum one-week timeframe for response, team members who don't respond will be recorded as having abstained from the vote
- Voting can be anonymous if necessary
- A motion is passed if the majority of the votes (greater than 50%) are in favour
- The Department Coordinator may choose to increase the majority quorum requirement to a 2/3 majority as deemed necessary, to also/better factor in the minimum number of voters and abstainers - such changes will be documented and reported to the board
- Inform the Department Coordinator of the motion and its results so that it can be added to the official motion registry on behalf of the team
- Liaise with other teams and departments as necessary to aid the team's work and goals
- Handle the handover to the next Team Leader in case of succession, as detailed further below
- Manage team's resources and request/arrange access where necessary (including, but not limited to: Google Group, Google Drive, Github, social media, Glip, email)
 - All documents, sheets, files, data etc should be kept in the team's official folder in the Department's Google Drive and never in personal accounts
 - Access to the team's Google Drive folder should be done via the team's Google Group
 - Official policies must always be followed for all resources and tools

Team Members and Contributors

- Appoint an Assistant Team Leader from within the team
 - If the Team Leader is not able to attend a meeting, they should ensure that the Assistant Team Leader is able to represent the team and has the necessary resources to do so
- If the team has an official website, appoint a member of the team to join the Webmasters Team and ensure that this member is following all defined changes, rules and policies from the Webmasters Team
- Ensure that the team's profile on the Volunteer Portal is kept up to date with team description, current members, available roles and contact information
- Ensure that at least two members of the team are able to complete any critical tasks or operations so that a fallback is in place
- Provide support to all team members and contributors and thank them for their work and feedback
- If it would help the team achieve its work, request that a member of another team to join this team as a liason
- Delegate work within the team as appropriate
- Ensure that all team members:
 - Are attending the team meetings every month, unless excused or agreed otherwise and are populating the meeting agendas
 - Are actively participating in the team's work and helping it achieve its goals
 - Have the necessary tools and resource access to participate in the team's work
 - Inform the team leadership of any periods of unavailability or additional availability
- Ensure that all team contributors are participating in the team's work

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- If a member or contributor isn't participating in the team's work at the required levels, arrange a chat with them to find out the reason and see if it can be resolved and explain that their membership could be downgraded / revoked if participation levels don't improve
- Depending on the composition and the work of a team, a team can decide to have subteams to work on a specified task to support the work of the parent team

Onboarding / Offboarding

- Team member / contributor onboarding
 - Exchange communications or arrange an informal chat to see if the potential volunteer is a good fit for the team and has the required time, skills and knowledge
 - If the volunteer is to join the team
 - Decide if the role is that of a contributor or member
 - Inform the Department Coordinator
 - Request official email account creation via OSM Secretary (members only, not contributors)
 - Arrange for any necessary accesses (including, but not limited to: Google Group, Google Drive, Github, Glip, email)
 - Provide training for the role
 - Provide support to the new member / contributor
 - Update the Volunteer Portal and ensure that the member has populated their address details as required by the bylaws
 - If the volunteer will not be joining the team
 - Inform the Volunteer Engagement Team of the discussion and invite them to contact the volunteer to see if they would be a good fit with an alternate team
- Team member / contributor offboarding
 - Enquire as to why the volunteer has chosen to leave the team
 - Thank them for their time as part of the team
 - Update the Volunteer Portal
 - Inform the Department Coordinator
 - Inform the Volunteer Engagement Team
 - Remove their access to all team resources and accounts, including the team's Google Group membership
 - If they are not a member of any other teams, arrange for the removal of their official email account

Communications

- Liaise with other teams and/or departments as necessary (e.g. if graphics for marketing are needed the team should contact the Marketing Team)
- Monitor the team's official accounts regularly and aim to respond within 48 hours to anything requiring a reply, delegating within the team as appropriate (e.g. social media, email, Glip chats, etc)
- If a public Glip chat for the team exists, actively monitor what is happening there and participate in conversations

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Election Cycles

- Team leaders' terms last for one year
- Elections should be held in advance of the term expiring, it is suggested to use the following month long schedule:
 - Announce election and invite people to submit nominations (time limit 1 week)
 - After one week, publish anonymous ballot and send to active team members (time limit 1 week)
 - After one week, voting results are announced, and handover period begins (time limit 2 weeks)
 - After two weeks, new team leader is officially in place
- Onboarding / Offboarding transition
 - Hand over the role and responsibilities to the newly elected team leader
 - Provide access to the new team leader for any necessary resources, e.g. Glip admin, documents, email addresses, social media accounts etc
 - Ask the new team leader to revoke any permissions to the outgoing team leader that are not granted to team members / contributors

Article 3. Supporting bodies.

- Assistant Team Leader
- Department Coordinator
 - Assistant Department Coordinator
- Volunteer Engagement Team
- OSM Board of Directors

Article 4. Resources.

- [OSM - Teams & Membership](#)
- [Board of Directors Meeting Reports](#)
- [Joomla! Volunteers Portal - Home of the Joomlaers!](#)
- [Joomla! Volunteer Engagement Team \(VET\) Official](#)

Article 5. Order of Precedence. In case of conflict between the provisions of this Policy, the order of precedence for conflict resolution in descending order shall be as follows:

1. Bylaws, including
2. amendments; and
3. the Policies.

This policy has been adopted by the Board of Directors of Open Source Matters, Inc. with the motion #2020-072 on May 21, 2020 and is published under the Policies section of the organization's website.