

# How to Form a Task Force

## Task Force Formation

Task Forces should be able to form with minimal effort and emerge naturally from discussions and needs within the community. A Task Force should show promise of inter-institutional convergence, joint development, and must encourage participation from community members.

Work should document needs and requirements in the form of a brief charter and published on the VIVO wiki. Documentation (charter, meeting schedule, agenda and minutes).

As you are forming your task force, please write a charter, see directions below. The charter provides an overview of the rationale for the work and a description of the work to be done. The Charter also serves as the "home page" for the task force in the wiki. All task forces are listed under [Task Forces](#) in the left hand menu. Agendas, minutes and working documents of task forces can be found under each task force home page.

## Task Force Charter

The charter should result in a common understanding of:

- The overall domain into which the discussion falls
- The shared needs and requirements within that domain
- Use cases that demonstrate these needs and requirements (optional - depending on the nature of the Task Force)
- A path towards one or more deliverables that meet the requirements
- The organizations/individuals willing to commit resources towards realizing the deliverable(s)
- The timeframe describing tasks and deliverable(s)

The charter provides the definition of the Task Force and its deliverables. It is not a contract and may be changed with the consensus of the members of the Task Force at any time, however significant changes such as a 6 month or more delay in timeframes, the abandonment of a deliverable, or the change in the overall scope of the work should be announced to the VIVO community via typical communication channels.

## Task Force Charter Template and Examples

To assist you in writing your Task Force Charter, use the template provided here --> [Task Force Charter Template](#).

Some examples of charters to get you started: [Search Index Configuration Task Force Charter](#), [2015 VIVO I-Fest Planning Team: Task Force Charter](#)

Keep in mind that the charter should be a brief, one page document that provides enough detail about the Task Force to allow readers to understand the context, objectives, and deliverables of the work. Include a timeline and list of members, including the facilitator. Writing the charter should not be an onerous, burdensome process. Keep it simple and brief.

## Task Force Approval

Once the draft charter is in acceptable form, community members are invited to participate via appropriate mailing lists. The email message includes access to the charter and seeks the engagement of the additional participants. Organizations must respond publicly that they are willing to take part and commit development resources towards the goals of the Task Force. At least three participants from the community should respond positively, and no more than three community participants may respond negatively, for the task force to be approved. If fewer than three participants are willing to contribute, then the Task Force is likely too specific and the work should be done outside of the Task Force process. If more than three community participants object to the work being done, then there is a significant issue that should be resolved before committing resources.

At least one calendar week must pass to allow participants to respond. If there are only one or two participants interested in working on the Task Force, the charter should be discussed and modified before re-announcing.

Once the Task Force is approved, a link to the charter will be added to the VIVO Wiki page that lists active Task Forces

## Task Force Requirements

A Task Force may self-organize in the most convenient manner to accomplish its tasks, including creation and assignment of additional roles and responsibilities as appropriate. Sub groups may be formed and disbanded at will, consisting only of members of the Task Force and do not need to separately meet the requirements of the Task Force.

### Meeting Schedules

Meeting times and agendas should be published in advance to encourage participation. Meetings should be added to the VIVO wiki calendar by including [vivosurvey@gmail.com](mailto:vivosurvey@gmail.com) in the list of invitees.

### Meeting Agendas and Notes

Meeting Agenda and Notes should be published on the VIVO wiki and all discussions within the task force must be transparent. A [Task Force Agenda Template](#) is available.

## Timelines and Deliverables

Task forces should strive to meet their timelines and produce the deliverables designated in their charter.

## Facilitator

Each Task Force must have at least one participant designated as Facilitator. Facilitators are responsible for promoting continued activity within the group

## Task Force Dissolution

A Task Force is dissolved under any of the following circumstances:

- All of the deliverables have been met. Hooray! Mark status as "Complete"
- The group becomes inactive. Mark status as "Inactive"
- The group does not engage three or more participants from the community
- The group does not have anyone willing to be the Facilitator

At such a time as a task force is dissolved, it is moved from the active list of task forces into a task force archive page. The charter for the task force should be updated with an info box (select info from the "+" menu on the Confluence page editor) indicating the final status of the task force and explanation if needed.

## Communication Channels

Several existing communication channels are available and new channels can be created to meet the needs of a task force:

- VIVO mailing lists
- [VIVOweb.org](http://VIVOweb.org) blog
- Twitter @vivocollab
- VIVO Facebook page
- LinkedIn
- Communication channels at DuraSpace (contact Carol Minton-Morris at [cmmorris@duraspace.org](mailto:cmmorris@duraspace.org))
- Dedicated channels may also be created