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Team Process Agreement

Version 1.0

*<Program/Project or Solution Name>*

**U.S. Department of Housing and Urban Development**

# Solution Information

|  |  |
| --- | --- |
|  | Information |
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| Solution Acronym | <Solution Acronym> |
| Project Number / Task Number | <From New Core Accounting System> |
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# Document History

<Provide information on how the development and distribution of the Team Process Agreement is controlled and tracked. Use the table below to provide the version number, date, author, and a brief description of the reason for creating the revised version.>

|  |  |  |  |
| --- | --- | --- | --- |
| Version No. | Date | Author | Revision Description |
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# Introduction

The purpose of the Team Process Agreement (TPA) is to describe the processes that will be followed to conduct iterations and ensure stakeholder agreement. All programs employing the agile methodology are required to have an approved TPA.

This document pertains to Release *<insert Release #>,* the *<first, second, third, etc.>* in a series of time-boxed releases that will deliver incremental functionality for the *<insert Project/Solution>*. Subsequent Team Process Agreement (TPA) documents will be developed for future releases.

## Overview

*<Succinctly summarize the purpose of the TPA. The following is an example of the intended content for this section. Change the content as appropriate.>*

The Project Team members will use the TPA to represent the work processes that are accepted amongst the agile team. The following items will be addressed in this agreement:

* Roles and Responsibilities
* Definition of Done (DoD)
* Release Structure
* Guiding Principles
* Work Agreements

## Core Team Members for Release

*<List the core team members or the Release in Exhibit 1. Add or remove roles and modify the “Responsibilities” column as appropriate.>*

Exhibit 1 reports the core team members that are responsible for delivering the release:

|  |  |
| --- | --- |
| **Role** | **Responsibilities** |
| Product Owner  *<insert name>* | The Product Owner serves as the voice of the customer and the voice of the Product Management Team (PMT) for releases representing all business and end-user needs. The Product Owner is responsible for continually socializing the release plan with the PMT and is a focal point for all business related activities and ensures compliance with business processes and the intended value of the functionality that is delivered. Product Owners communicate the details of the capabilities and approved scope to project stakeholders, and prioritize and decide which User Stories will be implemented in each Iteration. The Product Owner also makes day-to-day decisions and works closely with the team(s) to answer requirements questions, aids in providing acceptance criteria and helps with test case generation and making requirements decisions during the Iteration. The Product Owner approves each User Story based on clearly defined acceptance criteria and ultimately decides if a capability has been sufficiently implemented within a release. Additionally, the Product Owner leads the categorization and prioritization of defects. Product Owners help keep the team on track by conveying (and reminding) the team of the vision and goals of each Release and Iteration. |
| IT Project Manager  *<insert name>* | Each of the teams will have an agile IT Project Manager who is responsible for administering the team’s daily activities and for ensuring delivery of the User Stories. The IT Project Manager helps ensure an agile and disciplined approach to the development of the User Stories and ensures adherence to processes and quality standards. The IT Project Manager is responsible for managing the team’s commitment based on capacity as well as guiding the team in the assignment and prioritization of activities, implementing and facilitating Iteration Planning, Iteration Kickoff, Iteration Review and Iteration Retrospective meetings, tracking risks and providing status reporting and visibility to executives. The IT Project Manager works closely with the team to determine how to deliver the capabilities and approved scope of the release. Additionally, the IT Project Manager ensures the appropriate tools, facilities and support structures are in place to support the team and that technical compliance requirements are met. They develop and maintain relationships with business groups and infrastructure, maintenance and support teams to resolve conflicts and issues. The IT Project helps build and motivate the team, acts as a point of escalation for any team member, and protects their team from unnecessary distractions, helps clear roadblocks, escalates issues, identifies workarounds, expedites exceptions and ensures that impediments are removed for their team. |
| Solutions Architect (SA) Team Lead  (EA Representative)  *<insert name>* | The SA Team lead will leverage architecture standards to provide guidance in the development of the solution. The Solutions Architect assists the IT Project Manager in ensuring an agile and disciplined approach that adheres to quality standards is utilized in the development of the User Stories. They will work closely with IT Project Manager and Product Owner to understand the stories being developed and remove logistical and technical impediments or road blocks for the team to ensure team’s commitment is delivered; identifies workarounds and expedites exceptions. |
| System Owner  *<insert name>* | System Owners are dependent on information systems to fulfill the business requirements necessary to achieve their program area’s mission. They are responsible for the successful operation of those information systems and ultimately accountable for the security of their information systems. System Owners are also responsible for implementing management, operational, and technical security controls to ensure that they are effective in protecting the information and information systems under their purview. Moreover, System Owners are responsible for ensuring that System Owners of major and minor applications coordinate with System Owners of General Support Systems (GSS) that host their applications so they can better determine the adequacy of those GSS security controls, and identify and implement compensatory controls when vulnerabilities in the GSS controls exist. Security responsibilities must be included in the annual performance plans. Additionally, System Owners must ensure that:   * An ISSO is designated (in writing) for each information system under their purview; * Security Assessment and Authorization (SA&A) and continuous monitoring activities are completed; and * Plan of Action & Milestones (POA&Ms) are maintained and reported. |
| Subject Matter Experts (SME)  *<insert name(s)>* | SMEs report to the Agile Project Manager and are embedded in all agile teams that support major Releases. SMEs support the release team on an as-needed basis. They answer questions and provide user feedback to their team, help write and develop User Stories, assist in the design and interpretation of requirements, obtain approvals and additional feedback from their business organizations, validate business processes, and assess business needs. Their goal is to provide rapid feedback so their team can move forward efficiently. SMEs will also help develop Test Cases, Test Scripts and test data, participate in User Acceptance Testing during the Iterations and help prepare user documentation and training materials. |
| Business Analysts  *<insert name(s)>* | Business Analysts report to the IT Project Manager and are embedded in all agile teams. They answer questions and provide user feedback to their team, elaborate requirements, help write and develop User Stories and assist in the design and interpretation of requirements. Business Analysts support Product Owners, functional and independent testers and developers with issues, design and the resolution of defects. Business Analysts also help develop and review Test Cases, Test Scripts and test data and participate in User Acceptance Testing during the Iterations. |
| Testers  *<insert name(s)>* | Functional and Independent Testers report to the Agile Project Manager and review and execute Test Scripts against User Stories as developers complete them to determine if acceptance test criteria have been met for each User Story. Functional and Independent Testers participate in Iteration Planning and help define acceptance criteria, then develop Test Cases and Test Scripts and execute Test Scripts and provide feedback on the results. Functional and Independent Testers are integrated into and located with the agile teams. Other testers such as those doing Performance Testing or independent Section 508 Compliance Testing are also integrated into the agile teams. |
| Developers  *<insert name(s)>* | Developers report to the Agile Project Manager and develop design, write code and write and execute unit tests to implement the functionality represented by the User Stories. Developers work closely with other team members to achieve the Definition of Done (DoD) for each story. They collaborate daily with SMEs, testers and team members who perform support activities. They provide technical application development expertise and direction, ensure compliance with technical standards and guidelines and deliver the functionality to the rest of the team. Developers also trouble-shoot and resolve defects found in the functionality. Developers are also responsible for defining and standardizing architectural technical artifacts, and planning and executing builds and deployments. |
| Government Technical Representative (GTR) and Government Technical Monitor (GTM)  *<insert name(s)>* | The GTR and GTM support the Business Lead and IT PM by developing the acquisition documents necessary to execute the acquisition strategy; provides contract execution and administration activities in accordance with contract. |
| Security Specialist  *<insert name>* | The Security Specialist is a representative from the OCIO Security Office and provides major input into system security plan; provide input into other security activities, timelines, and cost estimates. |
| Infrastructure & Operations Representative  *<insert name>* | The Infrastructure & Operations Representative is a technical representative required to participate from the beginning of the project to address HW/SW and services needed to support the project, address development, testing, production, and backup requirements, establish service levels, provide major input into system security plans, technical design, test plans, data conversion plans, deployment/release plans, operational and maintenance plans. |
| Investment Management Representative  *<insert name>* | The Investment Management Division (IMD) Representative ensures projects/solutions follow investment management requirements, investment updates, monthly federal IT Dashboard updates, performance reporting, and other IT budget formulation and execution activities. |
| Privacy Officer Representative  *<insert name>* | The Privacy Officer Representative conducts initial privacy assessments to ensure appropriate controls are executed to protect sensitive and private information. |

**Exhibit 1 Release Team Roles and Responsibilities**

A comprehensive list of stakeholders associated with *<insert Project/Solution>* is found in Appendix A.

# Definition of Done (DoD)

The DoD defines the required steps to finish and deliver an incremental release with the best quality possible, from development thru deployment.

## Purpose of Definition of Done

An explicit and concrete DoD is a critical checkpoint in the agile development process. The DoD ensures that the functionality produced at the end of a sprint is of high quality with minimal defects.

## HUD Guidance

* The developer verifies that the code is complete and has passed unit test.
* The developer has checked the code into source code control.
* Development team has verified that the code passes automated unit tests.
* Independent testers have verified that the story meets the acceptance criteria and tests have been passed.
* User Acceptance Testing (UAT) has verified that the story meets acceptance criteria in an operational situation. Note that the UAT testers might have additional requested changes that will be entered as feedback and possibly addressed in a later iteration.
* Tests have been checked in to configuration management for continued use in regression.
* For UI-related stories, 508 testing has been completed.

Product Owner signs-off that story meets acceptance criteria and Definition of Done.

* Office of Administration, Chief Privacy Officer has reviewed and approved any new changes to content.
* The Security Team has been notified of, and provided informed consent regarding any security requirements related to the User Story, if applicable.

## User Story Development Definition of Done

All agile teams agree that the development and testing of a user story during a sprint is considered to be complete when:

* *<List in bulleted format all criteria which determine that all development requirements have been satisfied>*

## Definition of Done for Release Readiness

All agile teams agree that the DoD for Release Readiness (i.e., the activities that take place during the testing of user stories during the Hardening Sprint) has been met when:

* *<List in bulleted format all criteria which determine that all requirements have been satisfied and the product is ready for release.>*

# Release Structure

The release number will build incrementally on the system platform for which it has been created. The release will be structured as a series of time-boxed sprints, each lasting *<specify the sprint duration>* weeks. The program anticipates releasing to production at the end of every *<specify the number of sprints in the release>* sprints. See Exhibit 3 below. *<Use the table in Exhibit 6 to describe the release structure.>*

|  |  |
| --- | --- |
| ***Methodology Used (Iterations, Scrum, Kanban):*** |  |
| ***Number of Iterations:*** |  |
| ***Length of Iterations:*** |  |
| ***Number of Teams and Team Structure:*** |  |
| ***Use of Hardening Iteration?*** | *<Yes/No>* |
| ***Deployment to Production within Release?*** | *<Yes/No>* |

**Exhibit 3 Release Structure**

# Guiding Principles

All teams will adopt the following guiding principles foundational to agile practices. *<update as appropriate>*

|  |  |
| --- | --- |
| **Practice** | **How the team will use** |
| Frequent Releases | The Program will delivery incremental release to production This means that time to value is reduced and end users will receive new functionality in shorter increments. The ultimate goal is to have the output of each Iteration be a “potentially-releasable” version of the system. |
| Time-boxed Iterations | All Iterations will be time-boxed in length. As is standard with an agile approach, the Iteration length does not change to fit the amount of work. Rather, each team works together with its Product Owner to deliver the greatest amount of value possible within the fixed time-box of the Iteration. |
| Release Planning | All teams will take part in a series of release planning activities to ensure all teams are aligned to the goals and planned capabilities of the release. User stories will be identified for the release as well as preliminary estimates of story points. Product Owners will prioritize the stories and the teams will assign stories to iterations according to how the team feels which stories can be completed within the release. |
| Stories | All teams will use the construct of ‘User Stories’ as the basic unit of both planning and execution. Each User Story represents a piece of functionality that is testable, valuable, and small (small enough to build a number of Users Stories within an Iteration). Capabilities on the Product Backlog/Stack are decomposed into User Stories for major Releases on an ongoing basis and these stories are used to plan both Releases and Iterations. Work during an Iteration is accomplished on a story-by-story basis, with the design, development, testing, and integration activities followed for each User Story. User Stories are considered complete once all of the criteria on a standard checklist, known as the ‘Definition of Done’ have been met. |
| Iteration Reviews | Each Sprint will end with an Iteration Review or Demo. This meeting provides the chance for stakeholders to view the new functionality that was created during the Iteration—either as a demo or in a hands-on fashion. Depending on the functionality, User Stories developed by the team may or may not be included in the Sprint Review or Demo. Feedback from this meeting will be captured and used as the basis for potential new stories in future major Releases, which may be included in the next Sprint or in the next major Release. The prioritization of any new stories and whether they will be included in the next Sprint or Release will be determined by the Product Owner. |
| Retrospectives | Each team will conduct a Retrospective at the end of each Sprint to discuss lessons learned, the way they are working and any suggestions for changing their process. After the Retrospective, the teams are empowered to implement improvements as they start their next Sprint, and work with the IT Project Manager to make recommendations and implement improvements that might impact and benefit all teams. |
| Continuous Testing | Integrated testing of each User Story developed in a release will be conducted and testers will define test cases and scripts to serve as the story acceptance criteria. These criteria will establish any preconditions, triggering events, and negative test conditions, as well as specific testable criteria. Team testers are responsible for creating test datasets as applicable.  As with all agile approaches, testing will be conducted during Iterations and rapid feedback will be provided to the developers, who will remediate issues so that the User Stories can meet the Definition of Done within the Iteration. It is important to note that independent testers and users may be involved throughout the process, with the goal of producing fully tested and approved stories throughout each Iteration. In general, all teams will share a goal of producing high-quality, secure, completed functionality. |

**Exhibit 4 Guiding Principles**

# Agile Team Practices:

Each team within *<insert Project/Solution>* will implement the following practices as indicated: *<Update the table below in Exhibit 5 to reflect agile practices the team has adopted for use throughout this program. Select the practices that are applicable and edit the “How the team will use” column to reflect the specific use.>*

|  |  |  |
| --- | --- | --- |
| **Select** | **Practice** | **How the team will use** |
|  | Team Velocity | A team’s “velocity” is defined as the number of story points that the team can complete in Iteration. Velocity for each team will be measured and tracked over time, with the goal of having each team converge on a stable velocity. A team’s velocity numbers are used together with the story size estimates in order to predict how much work can be completed for an Iteration or set of Iterations. In addition, all teams use their velocity metrics to make a commitment about which stories they will finish in each Iteration. |
|  | Automated Builds | Automated code builds will be conducted daily. The goal is to completely automate the process of building the solution for a given environment at some point in the future; and the teams, working with the guidance of release management, are continuing to advance toward this goal. |
|  | Continuous Integration | The initial step towards continuous integration is an approach that includes frequent builds and the ability to test and respond to feedback daily. The Development Team will perform development and unit testing. Continuous Integration of Code/build will be created and pushed to environment on a daily basis. |
|  | Coding Standards | All teams will adhere to a common set of coding, architecture and design standards that are agreed upon and evolved by the entire Release Team and HUD EA. Release Team members that perform support activities will conduct design and code reviews with developers during Iterations on an ongoing basis. Common coding, architecture and design standards are documented in the HUD Enterprise Technical Architecture. |
|  | Refactoring | As developers conduct their work for a specific Release, they will use standard refactoring practices to improve the existing code. Refactoring work will be part of each User Story for a major Release, such that additional design debt is not incurred during the development of a story. |
|  | Automated Unit Tests | Automated unit testing will be conducted in accordance with the Test and Evaluation Master Plan (TEMP). |
|  | Automated Functional Tests | Automated functional testing will be conducted in accordance with the TEMP. |
|  | Regression Testing | Regression testing will be conducted in accordance with the TEMP. |
|  | Shared team workspace | The teams will be located in team areas located at: <insert applicable location(s)>. |
|  | Iteration Planning | An Iteration Planning meeting will be held as the first activity in each Sprint. The purpose of this workshop is twofold: 1) to discuss and communicate the detailed requirements for the User Stories to be built in the Sprint, and 2) to create a task-level plan for executing the work of the Sprint. The entire Release Team participates in the Sprint Kickoff, including any Release Team members that perform support activities. The output of the meeting is an agreed-upon set of acceptance criteria for each story, along with a commitment from each team regarding the work they will accomplish. |
|  | Recurring Meetings | Each team will hold a daily stand-up meeting to discuss the progress of the User Stories currently under development and to coordinate their work. One representative will attend the daily Release Management stand-up meeting to report key status and escalate any blockers that require further assistance outside of their team’s control.  Daily Stand Up: Time/Duration  Release Management: Time/Duration  Weekly Build Meetings: Time/Duration |

**Exhibit 5 Agile Team Core Practices**

## Cross-Team Alignment

In order to align all teams towards the release objectives, each team will adhere to the following standards:

* Teams will use the same process for identifying and sizing of stories. Stories will be estimated during release planning through *<insert estimation technique>* and refined during iteration planning.
* All teams will follow the same scale for point sizes of *<e.g., 1, 2, 3, 5, 8, and 13>*.
* Non-functional requirements will be represented as acceptance criteria for stories wherever possible.
* Inter-team dependencies at the story level will be identified through a story tracked by each team.
* All teams will have the same iteration cycle of *<insert iteration cycle>.*
* All teams will adhere to the critical architecture and coding standards defined by HUD.

## Use of Backlog Software

**Use of the tool:** <insert tool to manage Backlog> will be used to store the Release Backlog (all User Stories for all teams) and to produce the Burn-Down and Burn-Up charts providing stakeholders transparency into the release. The status of the tasks for each User Story can be found on the story boards in each team area.

**Access to the tool:** *<Describe tool access levels, licenses, how non-licensed users will have visibility into the Backlog, etc. Update the table in Exhibit 6 by inserting the names of individuals requiring access to the Backlog data. Add rows as necessary to reflect the various roles involved in the project.>*

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Access Level**  **(Full/Read Only)** |
|  | IT Project Manager |  |
|  | Core Product Owner |  |
|  | GTR/GTM |  |
|  | Technical Lead |  |
|  | Tester |  |
|  | HUD CIO |  |
|  | HUD System Owner |  |
|  | Agile Coach |  |

**Exhibit 6 Access Levels for Backlog Software/Tool**

## Working Agreements

The following are considered working agreements or “ground rules” to be observed by those responsible for the delivery of the solution. Ground rules are behaviors and rules the teams adopt because they are useful for working together in a productive and respectful manner. *<Modify the following working agreements as appropriate for the program.>*

**Dedicated and Integrated Team.** Members of all teams will be dedicated to their team and not tasked with other work that negatively impacts team productivity. Each team will work as an integrated whole toward achieving Iteration and Release goals. Together, each team’s members are expected to have all of the skills and knowledge needed to design, develop, test, and integrate the User Stories assigned to the team. Team members are also expected to develop into ‘generalizing specialists’, capable of performing a variety of different tasks. Core hours (when team members are expected to be in the team room) will be *<insert core hours for team>*.

**Escalation of Impediments.** The Agile Project Manager will oversee the removal of impediments for their team. The Agile Project Managers’ first resource in removing impediments is the Product Owner if the issue is related to requirements. If necessary, the issue should be escalated quickly for decision. Any impediments that cannot be resolved by the Agile Project Manager or Product Owner should be escalated as quickly as possible through the Program Manager, CIO, or as high as necessary. If an issue cannot be resolved within a day or two, the team will work with the Product Owner to remove the related User Story or Stories from the Iteration Backlog/Stack.

**Non-Code Artifacts.** Release Team members that perform support activities will include training and documentation experts who will assist the teams in producing documentation. Business SMEs (i.e., end users) will also participate in writing user documentation. The goal is to mix skill sets in such a way that the artifacts are produced efficiently and at a high level of quality. Core documents will be reviewed by the Technical Review Committee during the Release Planning and Release Readiness Reviews.

**Configuration Management.** It is expected that all software code, infrastructure components, documentation (such as User Stories, Test Scripts and Test Results) and all related release artifacts are base-lined and are placed under configuration management using the continuous integration process described above. The Release Backlog will be stored and configuration managed and accessible through *<insert Backlog management software/tool>*. All other documentation will be configuration controlled in SharePoint with the exception of source code. At the beginning of every Release, the teams will always begin development on the most recent software code baseline.

**Builds and Deployments**. Development of User Stories may require several builds and deployments throughout the day by each of the teams working on the release. Teams will adhere to the continuous integration process when checking in code, and will ensure that the checked in code does not result in a broken build. If the build breaks, the developer will roll back to the previous working build and make updates to the code to ensure a successful build.

**Design***.* For any stories that impact design, the Architecture and System Design document (ASD) will be updated during Iterations. The ASD will be configuration controlled in SharePoint and ‘snapshotted’ on a release basis. Reviews will also take place for selected User Stories that impact design. During the Reviews, the ASD as well as the actual code will be reviewed Technical Review Committee as well as any other stakeholders that have an interest in the design.

**User Interfaces***.* Based upon the Release Backlog/Stack, each team will forecast the need for legal, policy, privacy, and plain language reviews and proactively engage the Release Team members that perform support activities in these areas to conduct the necessary reviews using mock-ups. Most User Stories developed as part of a release will not require input from the legal, policy, privacy, and plain language teams. Each team will mock-up user interface changes and new pages and proceed at risk using assumptions and coordination techniques so as to minimally impede progress. Each team will document user interface behavior in User Story acceptance criteria.

**Enterprise Architecture.** Members of each team will work collaboratively with other agile team members to identify, develop and generate any necessary Enterprise Architecture (EA) artifacts. Most User Stories developed as part of a release will not require updates to Enterprise Architecture artifacts. Every effort will be made to simplify requirements and automate artifact generation through leveraging information captured in existing toolsets. Collection of EA data will be facilitated through access to the development toolsets utilized by the developers. Any changes or additions to the tools used for development activities will first require a migration of the baseline models to ensure consistency between past and future development efforts.

**Reports.** *<identify any tool that will manage reporting for the project>*

**End User Training Materials**. Release Team members that perform support activities will create and update as needed, end-user training materials such that all materials have completed reviews and approvals and are ready for deployment by the time of each release.

**Content Review**. Any external facing (customer) or internal facing (HUD employees) content that requires changes as a result of the development of a User Story must be reviewed and approved by the Office of Public Affairs and the Office of Privacy before it is deployed in the solution.

**Governance of Shared Components.** Each of theteams will proactively engage the Lead Data Architect from the Enterprise Architecture Team with any changes that need to be made to data models, message classes and other shared components (e.g., lists of values, mappings, encoded values) to ensure the integrity and quality of the data is maintained as changes are identified (for example in the design kick off or just in time). Meanwhile, the teams will proceed at risk using assumptions so as to minimally impede progress. Governance of services will be handled in a similar fashion.

**Security.** Each of theteams will meet all security compliance requirements. The HUD Chief Information Security Officer (CISO) designates individuals on each of the teams who are authorized to determine whether the Certification & Accreditation (C&A) process needs to be initiated for a given story. Each team will work through the Release Team members that perform support activities to mitigate any long-lead items as a result of this process.

**Independent Feedback**. Feedback that relates to a current User Story will be incorporated into the work of the User Story before it is considered done. Feedback related to other features or of a substantial nature will be added to the Product Backlog/Stack for prioritization by the Product Owner. Prior to any release, the Product Owner is responsible to ensure that the product is releasable, meaning that security, privacy, EA, and systems assurance needs have been met and that the product is compliant.

**Story Point Estimate Changes During Iterations**. Teams are strongly discouraged from adjusting story point estimates once work has begun on an Iteration (e.g., after the Iteration Kickoff). Occasionally a story will require significantly more or less effort than what is reflected in the point estimate. To capture this information for future planning, teams may indicate on the story card or spreadsheet that the story was under- or over-estimated. Teams are encouraged to revisit their Iteration commitment at least weekly, and make any necessary adjustments (e.g., removing a story) based on new information, as described in the following section. Completely new stories that are added in the middle of an Iteration should, of course, be estimated when they are added. At the end of an Iteration, the team’s velocity is calculated as the sum of the estimates of the stories completed in an Iteration. Velocity is used primarily for making predictions about the team’s ability to complete future stories (which are estimated with the same scale).

# Appendix A: Roles and Responsibilities

|  |  |
| --- | --- |
| Position & *Name* | Duties |
| HUD Chief Information Officer  *<insert name>* | * Briefs CCC/EIB on proposed and delivered technical capabilities and IT processes for each release, if necessary. * Informs agency decisions by providing recommendations and analysis on technical and IT process-related issues. * Provides guidance and direction related to all technical matters * Provides guidance and direction related to IT process issues, including agile and lean methodologies, the PPM, continuous delivery, etc. * Removes impediments to success * Serves as decision authority on all technical matters * Develops, maintains, and facilitates implementation of a sound and integrated IT architecture * Ensures that the system is secure as per FISMA and that the IT program is successful from an acquisition point of view (as per delegated authority from Clinger-Cohen) * Provides resources and expertise by overseeing technical resources, including OCIO federal staff, development contracts, integration contracts, architecture contracts, and test and QA contracts |
| Program Manager  *<insert name>* | * Serves as a liaison and facilitator to address any issues outside the team. May act as the lead liaison to business groups and support groups for issues. * Manages the day-to-day activities of the program and its projects and staff; communicates with project teams as necessary to ensure project deliverables are on schedule and within cost parameters. * Identifies, assesses, mitigates and monitors program risks * Resolves issues, scope, schedule and quality changes within the program * Monitors the critical path and the program’s performance * Ensures key resources are assigned for all work * Remove impediments to success |
| IT Project Manager  *<insert name>* | * Coordinates and manages the overall program from the IT perspective to ensure that the program meets strategic objectives and benefits. * Ensures that all release dependencies are identified and communicated to stakeholders (including schedules with milestones) * Ensures that release capabilities are properly estimated and apportioned across Agile Teams * Coordinates cross-cutting activities such as: integration, testing and deployment, sprint kick-offs and sprint reviews * Has overall project management responsibility for the release * Manages the day-to-day coordination of the IT activities that are program dependencies * Reports release status to Executive leadership * Monitors day-to-day progress of Agile Teams * Coordinates overall release compliance * Works with support stakeholders and Product Owners to resolve business/technical issues and dependencies that impact the work of Agile Teams * Resolves IT resource constraints and/or IT conflicts that affect the program * Identifies, assesses, mitigates and monitors risks associated with the release * Resolves issues, scope, schedule and quality changes within the release * Monitors the critical path and the release performance * Ensures key resources are assigned for all IT tasks * Removes impediments to success * Oversees all release gate reviews with the Technical Review Committee * Oversees IT contracts that support the program |
| Product Owner  *<insert name>* | * Responsible for ensuring that the core functionality for the system can be used for current and future benefits and that the overall vision for the system is realized. * Responsible for ensuring that user stories for core functionality are developed, tested and signed off on meeting requirements. * Responsible for ensuring that key technical and security stories and features are prioritized and implemented * Owns, contributes and prioritizes the System Backlog for specific capabilities and features so as to maximize the value of the features for the Sprints/releases * Works with IT Project Manager, Agile Team Leads and Agile Teams to clearly communicate business requirements needed to satisfy approved capabilities * Coordinates legal and policy review related to core functionality of system * Coordinates with Chief Architect on architecture design decisions for system * Represents the interests of everyone with a stake in the capabilities and features and its resulting product * Work with IT Project Manager and Agile Team Leads to ensure Business SMEs for core functionality are available just-in-time to support Agile Teams * Ensures that overall system meets approved capabilities * Takes action as required to resolve issues that cannot be resolved by the Release or Program Manager |
| Agile Team Lead (e.g., Scrum Master)  *<insert name>* | * Has project management responsibility within the scope of their Agile Team * Keeps IT Project Manager apprised of team progress and issues. * Works with Product Owner and Agile Team Members to ensure that release capabilities apportioned to their agile team are properly prioritized, estimated and sized * Works with Agile Team to ensure that user stories and related functions are developed, tested and approved. * Ensures that dependencies for capabilities assigned to their Agile Team are fully identified and communicated to the IT Project Manager * Reports day-to-day progress of Agile Team (e.g., burn-up/burn-down charts) * Works with Agile Team and Product Owner to resolve business/technical issues and dependencies that impact the work of the Team * Supports compliance with ETA and PPM requirements |
| Business SMEs  *<insert name(s)>* | * Provides just-in-time business expertise as requested by the Product Owner, IT Project Manager, or Agile Team Leads * Assists in the development of User Stories, test cases, data and scripts * Assists in design and interpretation of requirements * Validates business processes and assess business needs. * Provides rapid feedback * Participates in User Acceptance Testing * Reviews user documentation and training materials |
| Continuous Integration & Continuous Delivery Lead  *<insert name>* | * Manages across development teams to create and sustain Continuous Integration (CI), integration with other systems, automated testing, automated deployments, and other integration activities * Manages code versioning and maintain code baselines * Coordinates code reviews * Provides guidance for the adoption and use of the principle of Continuous Delivery (CD): deploy small, deploy often, learn and react * Provides tools to successfully execute CI and CD as prioritized. * In Partnership with Program Manager identifies and installs metrics to evaluate effectiveness of process improvements * As part of CI, ensures and supports instant feedback about the code’s syntactic correctness * In Partnership with Program and IT Project Manager ensures interfaces and integrations are being completed in a timely manner * Provides process/system design and optimization ideas for CI/CD |
| Chief Architect  *<insert name>* | * Oversees the overall architecture * Identifies architecture issues and make architectural decisions as needed, coordinating with the Technical Review Chair as appropriate * Manages the architecture and design services team * Execute proofs-of-concept, research projects, etc. as necessary to support architectural decisions * Ensures that solution architecture is integrated with enterprise-wide HUD architecture * Ensures that architecture remains flexible and able to accommodate changes * Provides architectural guidance to non-functional requirements such as flexibility, reusability, maintainability, extensibility, and scalability |
| Solution Architect (often contractor staff)  *<insert name>* | * Responsible for raising risks associated with the architecture. * Leads the completion of Technical Insertion (TI) * Executes architecture change process * Provides Enterprise Technical Architecture guidance to project teams * Develops program-specific Service Layered Architecture Profile (SLAP) to document architecture constraints and standards for project use * Provides support to ensure consistent design and compatibility with internal and external interfaces |
| Requirements Lead  *<insert name>* | * Supports IT Project Manager, Product Owners and Agile Teams on release backlogs/themes, epics, and user stories * Coordinates requirements across systems that are affected by or providing functionality to solution/system. * Contributes to the processes and standards for requirements management within HUD * Provides timely and effective communications (status, risks, issues, etc.) to IT Program Manager * Ensure issues related to requirements are identified and addressed quickly |
| CISO  *<insert name>* | * Ensures that security controls are built into the system * Works with Product Owner and developers to document security requirements * Coordinates the completion of documentation and tasks in support of Certification and Accreditation * Remediates issues |
| Agile Coach  *<insert name>* | * Oversees the development of Agency wide policies, processes, practices, principles, and guidelines supporting the ongoing transition to agile methodologies * Provides agile coaching resources to support development teams and to facilitate transition to agile methodologies * Oversees the mentoring, coaching, and support activities of the agile coaches * Provided training for Agile Management methodology selected for HUD * Identifies risks and issues that constrain Agile Teams from effectively and quickly delivering functionality that adds business value to HUD * Captures lessons learned from Agile releases implemented at HUD and promulgates to other Agile Teams so benefits can be realized across the Department |
| Change Control and Release Management Lead (IV&V testers)  *<insert name>* | * Assigns and oversees testing resources * Coordinates submission of HRMB artifacts and ensures successful approval by HRMB * Oversees the development and archiving of agile testing artifacts * Coordinates release activities with IT Project Manager |
| QA Lead  *<insert name>* | * Coordinates Release Planning Review and Release Readiness Review activities * Assesses the quality of artifacts to find and improve systemic quality issues * Undertakes specific quality and process improvement initiatives such as Lean Six Sigma efforts when appropriate * Oversees code reviews and sets up other quality assurance mechanisms |

# Appendix B: References

<Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.>

***Exhibit 6*** below summarizes the documents referenced in this document.

|  |  |  |
| --- | --- | --- |
| **Document Name** | **Description** | **Location** |
| <Document Name and Version Number> | <Document description> | <URL to where document is located> |
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# Appendix C: Key Terms

*<Insert the terms and definitions for terms and acronyms relevant to the content presented within this document.>*

|  |  |
| --- | --- |
| Term | Definition |
| [Insert Term] | <Provide definition of term and acronyms used in this document.> |
|  |  |
|  |  |