

# Project Collaboration Tools

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LF Energy maintains a number of tools to enable collaboration amongst community participants. To help navigate these tools, this document provides a brief outline of how to use them and best practices.

## Slack

LF Energy hosts a Slack organization, which can be joined using the [Slack Invite Link](#). Slack serves as the main communication platform for the LF Energy community outside of the mailing lists. It's important that conversations stay on topic in each channel, and that everyone abides by the [Code of Conduct](#). There are thousands of members who should all expect to have a positive experience.

Chat is searchable and public. Do not make comments that you would not say on a video recording or in another public space. Please be courteous to others.

Slack also maintains some [best practice etiquette](#), which has some great basic usage tips and other recommendations to best collaborate and communicate with others.

## DM (Direct Message) Conversations

Please do not engage in proprietary company specific conversations in the LF Energy Slack instance. This workspace is meant for conversations related to LF Energy topics and community. Proprietary conversations should occur in your company Slack and/or communication platforms. As with all communication, please be mindful of appropriateness, professionalism, and applicability to the LF Energy community.

## Specific Channel Rules

Some channels have specific rules or guidelines. If they do, they will be listed in the purpose or pinned docs of that channel.

## Escalating and/or Reporting a Problem

If you encounter an issue using the LF Energy Slack, please contact the [LF Energy Program Manager](#).

## Requesting a Channel

To add a channel, please [submit a request](#).

Some general guidelines on new channels...

- Channels should be dedicated to sub-projects, community topics, or related LF Energy programs/projects.
- Linking to resources will speed in the validation and processing of the channel creation request.
- Channels are NOT:
  - Company specific
  - Private channels with the exception of: code of conduct matters, mentoring, security/vulnerabilities, github management, or steering committee.
- Special accommodations will be made where necessary.

## Mailing lists

LF Energy maintains a number of mailing lists for the foundation itself, its members, and the community at large. These mailing lists are hosted at [groups.io](#) and managed by the Linux Foundation staff and LF Energy community leadership.

## Key mailing lists

The primary mailing list for all technical community discussion is [tac@lists.lfenergy.org](mailto:tac@lists.lfenergy.org). Each hosted project and working group has it's own mailing list as well.

## Moderation and Moderation Guidelines

By default, TAC voting members serve as the moderator for discussions in [tac@lists.lfenergy.org](mailto:tac@lists.lfenergy.org), and each hosted project's TSC will serve as moderator for it's mailing lists. Moderation privileges can be extended to others upon a vote by the TAC or respective TSC as applicable.

Being a moderator is as much a privilege as it is a duty. As part of volunteering to become a moderator you are now a representative of the LF Energy community, and it is your responsibility to remain aware of your contributions in this space. These responsibilities apply to all official LF Energy channels.

Moderators MUST:

- Take action as specified by these Moderator Guidelines.
  - You are empowered to take immediate action when there is a violation. You do not need to wait for review or approval if an egregious violation has occurred. Make a judgement call based on our Code of Conduct and Values (see below).
  - Removing a bad actor or content from the medium is required, do NOT let it sit there.
- Abide by the documented tasks and actions required of moderators.
- Ensure that the [Code of Conduct](#) is in effect on all official LF Energy channels.
- Make yourself generally available during working hours in your time zone for moderation. This can be handled as a group so that there is enough coverage of people to allow for absences/travel.
- Take care of spam as soon as possible, which may mean taking action by removing a member from that resource.
- Foster a safe and productive environment by being aware of potential multiple cultural differences between community members.
- Understand that you might be contacted by moderators, community managers, and other users via private email or a direct message.
- Keep up with software/platform changes on the property they are responsible for. This might include new UI changes, new features, or other software changes. Moderators are encouraged to meet regularly to train themselves how to be proficient with the platform.
- Report violations of the [Code of Conduct](#) to [operations@lfenergy.org](mailto:operations@lfenergy.org).

Moderators SHOULD:

- Exercise compassion and empathy when communicating and collaborating with other community members.
- Understand the difference between a user abusing the resource or just having difficulty expressing comments and questions in English.
- Be an example and role model to others in the community. In many cases, moderators are some of the first people new contributors will interact with.
- Remember to check and recognize if you need take a break when you become frustrated or find yourself in a heated debate.
- Help your colleagues if you recognize them in one of the stages of burnout.
- Be helpful and have fun!

## Mailing list best practices

- Review your mailing list subscriptions regularly, and either change the delivery mechanism ( such as switching from individual emails to daily digests ) as it makes sense to keep the signal-to-noise level reasonable for you.
- Keep your comments and conversation on topic
- Recognize with a global community and other obligations, replies aren't instantaneous.
  - Refrain from cross-posting as a way to get a larger audience to your post.
- Be sure to contact the list moderators if there are any [Code of Conduct](#) concerns.

## Calendars

You can stay subscribed to the meetings of the projects and committees of LF Energy by subscribing to the coordinating mailing list. Each mailing list has a calendar which you can subscribe to with your calendar client of choice.

By default, the following permissions apply to calendars:

- Voting TAC members can manage the [LF Energy-tac calendar](#).
- TSC project chairpersons can manage their respective project calendars.
- LF Staff can manage any calendar event

If you are running into an issue with calendar events, please [submit a request](#) and the LF Staff can help.

## Meeting management using LF Energy Calendar

By default, any TSC or TAC chairperson has the ability to schedule community meetings on the [LF Energy-tac calendar](#) or a project specific calendar, respectively.

### Create a new meeting

- Visit the calendar of the needed mailing list
- Scroll to the bottom of the group calendar, select Add Event.
- Fill in the fields for:
  - Event Name, enter descriptive name for your meeting.
  - Start and End Times, enter the details noting the Timezone, selecting All Day if applicable.
  - Event Repeats, select if applicable, and enter the additional details.
  - Location
  - Organizer Email, this will be the sub-group mail list

- Organizer Phone, is optional.
- Event Color is optional
- Description, this will be the relevant meeting details. It is recommend to enter the following:
  - Summary of the meeting purpose
  - Meeting lead name
  - Wiki page for reference
  - Full Zoom details
- Request RSVP, select this item to ensure that guests can provide a response to your meeting (Will Attend, Will Not Attend, and Not Sure). This will also allow you to see the responses within the meeting invite.
  - Max Number of Attendees, can be left at 0, which means unlimited.
  - Additional Information Requested From Attendees, is optional (such as in person attendance vs via Zoom), this will be asked on the RSVP page.
  - Note To Send Attendees, is optional (such as a thank you for the RSVP and a pointer to a wiki page for more information).
- Reminders, set this up for automatic email reminders to be sent to the applicable mail list regarding the meetings.
  - A 1 day before and 10 minutes before reminder is suggested as a standard, leave as Send As Normal Message.
- Notifications, you must select Send Invite To Group in order for the invite to be sent to the applicable sub-group.
  - Leave Send Notice To Group When Event Happens unchecked as it is not a necessary notification in most cases.
- [View How-to Video](#)

## Update a meeting

- Visit the calendar of the needed mailing list
- Click on the event you are updating and select Edit Event and make the applicable changes.
  - Select Update Event to save the changes and ensure you choose the update to reflect on Only This Event or All Meetings as applicable.

The meeting update will be reflected in the meeting subscription with the next automatic update.

## Cancel/Delete a Meeting

- Visit the calendar of the needed mailing list
- Click on the event you are updating and select Edit Event, scroll to the bottom of the Event and click on Delete Event.
  - You'll need to select either Only This Event or All Meetings as applicable here as well.

The meeting update will be reflected in the meeting subscription with the next automatic update.

## Calendar guidance

To help individuals to not be inundated with calendar overload, try to follow these guidelines:

- The [LF Energy-tac calendar](#) should only be used for TAC meetings, meetings or events for the full LF Energy community, and kickoff meetings of new projects.
- Specific project meetings should be on your project's calendar. All meeting should be on the primary discussion, dev, or user calendar unless it's a specific closed meeting to discuss a sensitive topic.
- Avoid making any meeting invite changes ( including cancellations or reschedulings ) less that 24 hours in advance, as many calendaring clients do not update immediately. It's also best practice to email that calendar's respective mailing list to inform the group of the cancellation.
- If you are rescheduling a meeting, cancel the previous one and issue a new meeting instead of doing a reschedule. Some calendaring clients don't do well with meeting invite changes.

## Subscribing to calendars

Instructions for subscribing to an iCal calendar for popular calendaring tools:

- [Google Calendar](#) - note calendar updates only happen once daily
- [Outlook](#)
- [Apple Calendar](#)
- [IBM/HCL Notes](#)

## Calendar management best practices

- Do ensure that any meeting invites have clearly identified web conference or location details.
  - Unless the meeting is only in person, always provide a web conference for those who can't attend in person
- Be sure the description of the meeting has an agenda or a link to the agenda of the meeting.
- Since calendaring clients can not always be good at managing changes...
  - If a meeting is to be rescheduled, delete the original meeting invite and add a new one with a title denoting it being rescheduled.
  - Avoid cancelling meetings within 24 hours of the meeting
  - For changes/cancellations, email the invitees as well to inform them of the cancellation
  - When provisioning a new series of recurring meetings, instruct invites to remove old entries manually.
- Courtesy Email, as a meeting lead it is a best practice to email the applicable sub-group with a note about any new meetings available, any meeting changes, or meeting cancellations.