

Technical Project Getting Started Checklist

Welcome to the LF AI & Data Foundation! Below is a checklist to help you get started as a new technical project.

Please bookmark this page and "watch" (top right of page to enable watching) the page for updates. For any questions, please email info@lfaidata.foundation to connect with LF AI & Data staff.

Please copy and paste this checklist onto your project wiki to track your progress - Please include links to your finished work.

If you are not familiar with Confluence/Wiki or need a refresher, visit the [Confluence Overview](#).

- ☐ Upon LF AI & Data TAC Project acceptance, a series of asset transfers will be set in motion. Standard transfer list includes:
 - ☐ Trademark
 - ☐ Website Domain (if Project has an existing site)
 - ☐ Social Media Handles (if any)
 - ☐ GitHub
- ☐ Review and Bookmark the LF AI & Data Wiki Homepage
 - ☐ Familiarize yourself with the key resources for the [LF AI & Data Foundation](#)
 - ☐ This Wiki is owned by the LF AI Foundation Community. In the upper right of this page, select Log In to contribute. You will need a Linux Foundation ID (created at <https://identity.linuxfoundation.org/>) to log in. For a Confluence overview, click [here](#).
- ☐ Project Wiki
 - ☐ Expand upon the wiki created for the project - The wiki will be publicly available
 - ☐ Example wiki pages include: Homepage, Introduction/Overview, TSC, Calendar, Documentation, Releases, Community Governance, etc.
- ☐ Project Mail Lists
 - ☐ Subscribe to the project specific mail lists via the [LF AI & Data Groups.io](#) - Subscribe to any other mail lists your are interested in
 - ☐ The Project Lead(s) should be set as moderator for ongoing management of the project specific mail lists
 - ☐ Project Leads must review and follow the processes outlined in the [LF AI & Data Foundation - Community Meetings and Calendars](#) overview which includes information on meeting management, eligibility requirements for authorized meeting hosts, instructions, FAQ, etc.
- ☐ Project Meeting Calendars
 - ☐ All project group meetings are also populated on the project wiki under the calendar page set up for each project under their wiki space after acceptance as an LF AI hosted project - [Example](#)
 - ☐ The Project Lead(s) should be set as moderator for ongoing management of the project meetings which are managed through Groups.io
 - ☐ Project Leads must review and follow the processes outlined in the [LF AI & Data Foundation - Community Meetings and Calendars](#) overview which includes information on meeting management, eligibility requirements for authorized meeting hosts, instructions, FAQ, etc.
 - ☐ Project Leads should work with LF & Data Staff to provision Zoom meeting Host access for project meetings based on the instructions noted in the resource link above
 - ☐ Once meeting(s) have been scheduled in Zoom, those details should be added to the [Groups.io](#) mail list calendar which will also populate the wiki group calendar, full instructions at [LF AI & Data Foundation - Community Meetings and Calendars](#)
 - ☐ Community members must Subscribe to all meeting invites for mail lists which they belong to at and wish to populate in their local calendars, full instructions at [LF AI & Data Foundation - Community Meetings and Calendars](#)
- ☐ Project Slack
 - ☐ Projects can establish Project channels on the LF AI & Data Slack (examples: #project, #project-help, #project-tsc) - For questions on setting up channels, email operations@lfaidata.foundation
 - ☐ A free Slack account was set up for the LF AI & Data Foundation - This Slack account was set up with an inviter tool that allows automatic invites to anyone who would like to join versus an admin manually inviting each user (also bypasses the same company email domain restriction that login into slack normally requires) - Those interested in joining the LF AI & Data Slack account can visit <https://slack.lfai.foundation>, where they can enter in their preferred email address and the invite to join the LF AI & Data Foundation Slack will automatically be sent to their email for signing in or signing up - They should then join the channels they are interested in
 - ☐ Note: This is the [Free Slack](#) service, which does have limitations - The primary limitation is the message search only going back to the most recent 10K messages, thus, this tool should only be used for basic/informal communications that can be followed up with separate discussion via the applicable mail list or other tool/channel such as the LF AI & Data wiki or GitHub
 - ☐ If the LF AI & Data Slack account is used, the Projects should post this information on your wiki page (or other centralized information tool, such as GitHub) with any adjustments based on how your community chooses to utilize the communication channel

- ☐ Committee Chairs: It would be recommended to post this information on your Trusted AI Committee wiki page with any adjustments based on how your committee chooses to utilize the communication channel.
- ☐ GitHub Recommended Practices for LF AI Projects
 - ☐ Review and implement the [GitHub Recommended Practices for LF AI Projects](#) - Please reach out to LF AI & Data staff with any questions
- ☐ Project Technical Charter
 - ☐ Review the project charter to determine the various actions required (common examples noted below) - The project's charter will be linked to the project wiki home page
 - ☐ Document Mission and Scope of the Project
 - ☐ Ensure the project's README file within the code repository in GitHub lists the project's mission
 - ☐ Ensure the project is using an OSI-approved open source license
 - ☐ Kick off the Technical Steering Committee (TSC) for technical oversight of the project (**Graduation project requirement only but best practice for Incubation projects**)
 - ☐ Establish the TSC voting members according to the project charter - TSC voting members must be listed on the project wiki - [Example](#)
 - ☐ Build out a community governance wiki page with the projects details - [Example](#)
 - ☐ Establish a recurring (minimum monthly suggested) TSC meeting which should be open to the public; electronically, teleconference, or in person - LF AI & Data staff can help schedule the first meeting
 - ☐ TSC meeting information should be included on the project's wiki - [Example](#)
 - ☐ Build out a TSC calendar (utilizing [Groups.io](#)) on the project wiki which will grow with the project to later include committee meetings, events, etc. - [Example](#)
 - ☐ Set a meeting process which must include: [Example](#)
 - ☐ Meeting minutes (attendance, quorum check, key discussion items, actions) posted to the project wiki and emailed to the project mail list
 - ☐ Meetings should be recorded and posted to the project wiki with the link included in the email sent to the project mail list
 - ☐ Identify the project roles (contributors, committers, etc.) according to the project charter and document them on the project wiki - [Example](#)
 - ☐ Establish and document on the project wiki the work flow procedures for (1) the submission, approval, and closure /archiving of projects, (2) set requirements for the promotion of Contributors to Committer status, as applicable, and (3) amend, adjust, refine and/or eliminate the roles of Contributors, and Committers, and create new roles, and publicly document any TSC roles, as it sees fit - [Example](#), [Example](#)
 - ☐ Elect a TSC Chairperson - [Example](#)
 - ☐ Ensure all TSC members are familiarized with the roles and responsibilities listed in the project charter - The project's charter will be linked to the project wiki home page
 - ☐ TSC Voting (**Graduation project requirement only but best practice for Incubation projects**)
 - ☐ Understand the voting requirements (eligibility, quorum, etc.) and procedures as noted in the project charter - Voting details should be noted on the project wiki - [Example](#)
- ☐ Compliance with Policies
 - ☐ Adopt a code conduct (subject to LF AI approval) or utilize the LF Projects Code of Conduct listed at <https://lfprojects.org/policies/> - Document the Code of Conduct on the project wiki
 - ☐ Understand and adhere to the Series Agreement for the Project and the Operating Agreement of LF Projects listed at <https://lfprojects.org/policies/> and as noted in the project charter
 - ☐ Adhere to the processes required for any policy changes according to the project charter - Any changes must be documented on the project wiki
 - ☐ Allow open participation from any individual or organization meeting the requirements for contributing under the project charter and any policies adopted for all participants by the TSC, regardless of competitive interests - For any concerns, reach out to LF AI & Data staff
 - ☐ Operate in a transparent, open, collaborative, and ethical manner at all times - The output of all project discussions, proposals, timelines, decisions, and status should be made open and easily visible to all - For any concerns, reach out to LF AI staff
- ☐ Community Assets - Understand and adhere to the guidelines set in the project charter
- ☐ General Rules & Operations - Understand and adhere to the guidelines set in the project charter
- ☐ Intellectual Property Policy - Understand and adhere to the guidelines set in the project charter
- ☐ Amendments - Understand and adhere to the guidelines set in the project charter

- ☐ TAC Sponsor Engagement
 - ☐ As an LF AI & Data Technical Project benefit you have an LF AI Technical Advisory Council (TAC) sponsor assigned to help guide your project - We encourage you to connect with your TAC sponsor and leverage the wealth of knowledge that they can provide - Contact LF AI Staff if you do not know who your sponsor is
- ☐ CII Best Practices Badge Program (**Graduation project requirement only but best practice for Incubation projects**)
 - ☐ Learn more here: <https://bestpractices.coreinfrastructure.org/en> and notify LF AI Staff on your status and any questions