Technical Project Getting Started Checklist

(Project input always welcome to add to/enhance the list below)

Welcome to LF Edge! 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@lfedge.org to connect with LF Edge 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 Edge TAC Project acceptance, a series of asset transfers will be set in motion. Standard transfer list includes:
    - [ ] Trademark (Unless we are coming up with a new name for the Project or the Project is newly created, all Project names need to be transferred to LF Projects, LLC to be held for the benefit of the community (done using a Project Contribution Agreement). This is required even if no trademark registrations have been secured in the Project's name.)
    - [ ] Website Domain (if Project has an existing site)
    - [ ] Social Media Handles (if any)
    - [ ] GitHub (LF enforces 2FA on all of our organizations. Please also inform all developers to enable 2FA on their Github accounts, if they haven't already.)
- [ ] Project Integration into LF Edge Overview Deck(s)
    - [ ] Work with LF Edge staff to add Project to main Overview Deck, Getting Started Guide (pointed to under Resources tab of https://www.lfedge.org/ as well as presented at Conferences/Events/etc)
- [ ] Project Logo
    - [ ] Transfer existing or work with LF Creative Services team to build out/finalize a new logo. Other LF Edge Project logos can be seen at https://www.lfedge.org/projects/
- [ ] Review and Bookmark the LF Edge Wiki Homepage
    - [ ] Familiarize yourself with the key resources for LF Edge
- [ ] Project Mail Lists
    - [ ] Subscribe to the project specific mail lists via the LF Edge Groups.io - Subscribe to any other mail lists your are interested in
        - [ ] Projects should establish, through the LF Edge staff, an initial set of mail lists (examples: project@, project-tsc@, project-devel@)
    - [ ] The Project Lead(s) should be set as moderator for ongoing management of the project specific mail lists - LF Edge staff can assist with moderator permissions
- [ ] Project Meeting Calendars
    - [ ] Work with LF Staff to provision Zoom meeting Host access for your Project meetings
    - [ ] Once meeting(s) have been scheduled in Zoom, add them to the Groups.io mail list calendar - Example, Example
        - [ ] Community members can Subscribe to all meeting invites for mail lists which they belong to at https://lists.lfedge.org/calendar (note: if you are not subscribed to any mail lists, this would appear empty)
            - [ ] For legacy Projects which have their own Groups.io instances, community members will need to subscribe to their meeting invites separately (Akraino Edge Stack, EdgeX Foundry)
        - [ ] Current advisory notice: Known integration issue between Groups.io calendars and some mail clients (due to time zone change). Recommended solution is to schedule meetings on Groups.io calendars using UTC zone. This will populate calendar entries correctly across all mail clients (Outlook, Gmail, etc.)
    - [ ] A Community Meetings & Calendar page can be created on your Wiki with detailed instructions - Example
- [ ] Project Slack
    - [ ] Establish Project channels on the LF Edge Slack (examples: #project, #project-help, #project-tsc) - Note Slack's message archiving limits; encourage usage primarily for short-term discussion (not something you may want to reference later). Mail lists will be best in most instances.
- [ ] 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.
- [ ] GitHub Recommended Practices for LF Edge Projects
    - [ ]

- Review and implement the GitHub Recommended Practices for LF Edge Projects (Links to LF AI – For LF Edge TAC Consideration on whether to adopt a similar set of recommendations)
  - [ ] Document the process by which contributors can become maintainers (and eventually be retired) - example
  - [ ] Have a MAINTAINERS.md (or rst) file in each repo documenting who the maintainers are - example
  - [ ] Adopt a common repository structure for all of its projects, leveraging the TODO repolinter tool to enforce it - example

- [ ] LF Edge PPT/Google Slides Template
  - [ ] Please email LF PM for PowerPoint/Google Slides template, for use in TSC meetings, etc..

- [ ] Project Technical Charter
  - [ ] Review the project technical charter (draft will be sent by the LF) to determine the various actions required (common examples noted below) - The project's technical charter will be linked to the project wiki home page (Technical Charters for all LF Edge Projects can also be found at https://wiki.lfedge.org/)
    - [ ] 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
      - [ ] Establish the TSC voting members according to the project technical charter - TSC voting members must be listed on the project wiki - Example
        - [ ] Build out a community governance wiki page with the projects details - Example 1, Example 2 (Best Practice for Stage 3 Projects)
      - [ ] Establish a recurring (minimum monthly suggested) TSC meeting which should be open to the public; electronically, teleconference, or in person - LF Edge staff can help schedule the first meeting
        - [ ] TSC meeting information should be included on the project's wiki - Example
        - [ ] Set a meeting process which must include:
          - [ ] Meeting minutes (attendance, quorum check, key discussion items, actions) posted to the project wiki and emailed to the project mail list - Example (LF Edge Staff can help set up your Confluence for Meeting Minute tracking)
          - [ ] 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 technical 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 technical charter - The project's technical charter will be linked to the project wiki home page
    - [ ] TSC Voting
      - [ ] Understand the voting requirements (eligibility, quorum, etc.) and procedures as noted in the project technical charter - Voting details should be noted on the project wiki - Example
    - [ ] Compliance with Policies
      - [ ] Adopt a code conduct (subject to LF Edge 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 technical charter
      - [ ] Adhere to the processes required for any policy changes according to the project technical 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 technical charter and any policies adopted for all participants by the TSC, regardless of competitive interests - For any concerns, reach out to LF Edge 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 Edge staff
    - [ ] Community Assets - Understand and adhere to the guidelines set in the project technical charter
    - [ ] General Rules & Operations - Understand and adhere to the guidelines set in the project technical charter
    - [ ] Intellectual Property Policy - Understand and adhere to the guidelines set in the project technical charter

- [ ] Amendments - Understand and adhere to the guidelines set in the project technical charter

- [ ] Getting LF IT Help (Projects) - General problems and support requests: If you need help with anything IT-related for your LF IT project, please use our Service Desk platform to open a support request: support.linuxfoundation.org (more information)
- [ ] TAC Sponsor Engagement
  - [ ] We encourage you to connect with your TAC sponsors and leverage the wealth of knowledge that they can provide

- [ ] CII Best Practices Badge Program (Best Practice for Stage 3 Projects)
  - [ ] Learn more here: https://bestpractices.coreinfrastructure.org/en and notify LF Edge Staff on your status and any questions
  - [ ] Get onboarded to LFX Security within 90 days of joining