

New Project/Working Group Onboarding

Welcome to the LF Energy Foundation as a new project or working group. The LF Energy Foundation provides many services and tools to help your project get off the ground and be successful. The LF Energy team will reach out soon after the TAC approves the project or working group to guide you through onboarding. This document outlines the process so you know what to expect.

Setting up the Infrastructure

Your project will be able to leverage the [LFX Project Control Center \(PCC\)](#) to manage your project's collaboration and development infrastructure.

To get this going, you must provide a list of individuals and their email addresses who will be the initial members of the Technical Steering Committee, Steering Committee, or Working Group. Once that is done, the following steps are to work with the group to schedule a kickoff meeting, where a member of the LF Energy team will help guide the group on its purpose and role, identify an initial lead, and set a cadence for future meetings.

The various project infrastructure pieces will be reviewed during the kickoff meeting, namely...

- **Mailing lists:** the LF Energy team will set up a primary discussion list and sometimes a private list if needed.
- Slack channel, which is added to the [LF Energy Slack organization](#).
- The transition of any existing code into a project-managed location. Generally, projects establish a new GitHub organization, and the LF Energy staff can help get this going for the project with all the correct settings and integrations in place. LF Energy staff will also coordinate a license scan as part of the transfer to identify any key concerns (more details at [License Scanning and Analysis Support Program](#))
- If desired, set up a wiki space under the LF Energy Confluence site.
- Identifying any other project accounts or services and ensuring those credentials are held in the LF Energy 1Password account with access provided to the relevant project members and LF Energy staff (for continuity purposes)
- Enable services such as [LFX Insights](#) and [LFX Security](#) for the project.
- Ensure the project leads are set up to maintain the PCC entry.

Establish Project Governance

A vital piece of the onboarding is for the project to establish governance for the project's activities. Public, transparent governance helps others understand the rules of engagement and how the project works, as well as helps guide project leaders and maintainers as the project grows to ensure smooth operations.

The first governance piece is the technical charter, establishing the project entity. The technical charter and any other legal documents needed to establish the project entity will be reviewed during the kickoff meeting. For working groups, there will likely be a more straightforward charter defining the working group's purpose, goals, non-goals, and deliverables, which the TAC will approve before moving forward on any work.

All projects and working groups should establish day-to-day governance and processes which build on the charter. Key ingredients should include...

- A LICENSE file in every code repository or primary location for deliverables, with the license chosen as an OSI-approved license or Creative Commons if appropriate
- A README file welcoming new community members to the project and explaining why the project and working group are helpful and how to get started.
- A CONTRIBUTING file explaining to other developers and your community of users how to contribute to the project. The file should describe the types of contributions needed and how the process works.
- A CODEOWNERS or COMMITTERS file to define individuals or teams that are responsible for code in a repository; document current project owners and current and emeritus committers.
- A CODE_OF_CONDUCT file that sets the ground rules for participants' behavior and helps to facilitate a friendly, welcoming environment. By default, projects should leverage the Linux Foundation Code of Conduct unless an alternate Code of Conduct is approved prior.
- A RELEASE file that provides documentation on the release methodology, cadence, criteria, etc.
- A GOVERNANCE file that documents the project's governance policies and procedures.
- A SUPPORT file lets users and developers know how to get help with your project.

Templates for these files are available at <https://github.com/lf-energy/tsc-template>. It's recommended to establish these files within the project's GitHub repository or at least point to those files from the GitHub repository to the project website, documentation, or wiki page. Working groups should establish these policies in the provided wiki space on the LF Energy wiki for collaboration.

Marketing and Outreach

Once a project is in the [Incubation stage](#) or a working group is approved by the TAC for the next lifecycle stage, the LF Energy team will work with the project to get started on various to help drive awareness of the project broadly in the energy industry.

The first two things a project or working group must do to get this going are:

1. Complete the [logo creative brief](#) to have a project logo designed. The LF Creative Services team will provide a few options for review and work in tandem with the project to ensure it's a logo everyone likes. All project artwork will be added to the [LF Energy Artwork repository](#) for easy access for project participants.
2. Complete the [website and marketing questionnaire](#) to have the webpage on the LF Energy site built out, along with the project announcement. The LF Energy marketing team will let the project review the content for both and allow the project to provide feedback and suggestions.

Generally, projects and working groups are announced in the following way.

- The project will be added to the [LF Energy Landscape](#) and [LF Energy website project listing](#).
- A blog post announcing the project on the [LF Energy blog](#).
- Inclusion in the next [LF Energy momentum press announcement](#).

The LF Energy marketing team will also identify other opportunities for outreach at launch, including interviews, videos, webinars, and further event participation that make sense for the project.

Ongoing, the LF Energy Blog is a communication channel for projects and working groups to share and promote new features, releases, and other announcements. The LF Energy team encourages guest blog posts and welcomes your participation to help promote your project or working group. Please submit a request to the [LF Energy Service Desk](#).

Please follow and engage with [Twitter](#) and [LinkedIn](#). The LF Energy team is happy to coordinate social media posts and help amplify the promotion of your project. Please submit a request to the [LF Energy Service Desk](#) to coordinate.

Growing as a project

As an operating project or working group, you should review the lifecycle requirements to see how to move to the [next growth stage](#). The LF Energy staff is here to help and provide advice, support, and guidance as your project grows. Additionally, it would be best to work with your TAC Sponsor to assist with industry connections and general advice on navigating the industry.

On an annual basis, projects come back to the TAC for a review to ensure the project is still at the right stage of maturity and to help the project identify any growth opportunities, as well as challenges the project might need assistance with; you can review the [project review schedule](#) for more details. In June and December, the LF Energy staff conducts a maintainer survey to get feedback on the overall program and ensure collectively that projects are being served appropriately.

Have questions?

The LF Energy staff is always here to help. Please create a request at the [LF Energy Service Desk](#) for any questions or concerns you might have.