

Getting Started: A Checklist

Getting started; a checklist for gathering information needed to write a project proposal.

- Roles and responsibilities
 - **Project Sponsor** -- the person the Project Lead reports to with regard to the project, whose role is to offer support and assist with problem-solving. When a group (committee, working group, etc.) proposes a project, the chair of the group will be the sponsor.
 - **Supervisor** -- the person the Project Lead or a Project Contributor reports to in the course of their regular job duties.
 - **Project Lead** -- the person who submits the project proposal, approaches and seeks permission from supervisors of all Project Contributors, manages the project, and reports on progress.
 - **Project Contributor** -- a person who provides expertise, staff time, facilities, equipment, money, or other resources to a project.
 - **LPRP Sponsors** -- Senior library administrators designated by the University Librarian to oversee the LPRP process and provide guidance and feedback to the Project Lead on their development of a project proposal.
- Create a rough outline of the idea
 - Identify scope
 - Collection(s)/service(s) and/or library locations involved;
 - Estimated item count, e.g. pages / folios / photos / objects (if relevant)
 - Services
 - Departments/units affected
 - Resource requirements such as, staffing, use of consultants, space, supplies, etc.
 - Consider possible funding sources
 - Identify desired outcomes
 - Identify target audience; Yale faculty and student interest must be described and addressed
- Discuss with supervisor(s) and get permission to proceed
- Set timeline for investigation, interviews, and proposal preparation
- Identify intellectual property issues
- Digitization projects: conduct a review of titles to determine whether or not digital files exist elsewhere
- Contact possible participating [library units/departments](#) [1] in order to discuss the project
 - Share the outline of the project and its desired outcomes in advance of meetings with potential participating library units/departments
 - Identify their potential needs/participation in terms of space in which to work, skills needed to complete the work, and availability
 - Get their agreement to participate
- Draw up an initial list of tasks (participating units/departments can help with this) and if possible, at this stage, identify milestones involved in the proposed work.
- Establish a sustainability plan

The above information will be used in writing the project proposal.

Source URL: <https://web.library.yale.edu/project-planning-guide/getting-started-checklist>

Links

[1] <https://web.library.yale.edu/project-planning-guide/who-contact-and-what-consider-project>