

Workflow for Project Teams

Creating the Project Plan

This workflow covers the immediate steps to take when you've thought of a new idea for a project. **Please note:** There should be no proposal work happening in ClassWeb Plus until projects receive approval.

1. Review the Guidance for Initiating Projects, available online at the SACO Projects page. This will familiarize the team with the work that goes into initiating and planning new projects.
2. Download and complete the SACO Project Plan Template, available online at the SACO Projects page.
 - a. Completing the project plan template will require some preliminary research and analysis by the Project Team:
 - i. You should conduct enough research to be able to list key authoritative sources that you will reference during your work. This list does not have to be exhaustive. It simply has to show that there are credible sources that support your project.
 - ii. You should conduct enough analysis in existing LC vocabularies to provide estimates of the number of records you will change, cancel, or create.
 - iii. You should conduct enough searches in existing documentation to determine if there are obvious updates to be made.
 - b. **Please note:** The above is preliminary research. After the project is approved, we anticipate that the Project Team will do more thorough investigations; locate additional sources; do more exhaustive research; etc.
3. When the project plan is complete, please email the plan to SACO@loc.gov.
4. The SACO Lead will distribute the project plan to other policy specialists for review.
 - a. Our goal is to review plans within two weeks.
 - b. If there are questions about the plan, we will be in touch.
 - c. The SACO Lead will notify Project Teams when plans are approved.

Executing Your Project

This workflow covers the steps Project Teams have to take during project execution. This does not cover how to distribute or manage work within your team; that is left to the discretion of the team itself.

1. After your project plan is approved, several things will happen:
 - a. Your plan will be added to the SACO Project Signboard and made available online.
 - b. Your team can choose to post your plan on SACOLIST or the SACO space within the PCC Wiki to recruit more team members.
2. The Project Team is now ready to execute the work described in the plan. **Please note:** If, during the course of your project, you find your scope expanding to include work that you didn't initially plan for, please contact the SACO Lead.
3. The Project Team completes their research and inputs proposals into ClassWeb Plus.
4. The Project Team prepares a spreadsheet that includes a listing of all new and change proposals; there is an Excel template available for recording project work at the SACO Projects page.

5. When all proposals have been made and your spreadsheet is complete, please contact saco@loc.gov. Use the email subject line **Project [your project name] ready to schedule**. Remember to attach the spreadsheet where you've been recording your project proposals.