How to Create and Review a Project Proposal

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Process Overview

The Project Proposal process begins with the creation of a Project Proposal. The project proponent, may be a Sponsoring Work Group or a project or individual with an idea for work to be done at HL7, creates the Project Proposal Form in JIRA using the link in Confluence. The ultimate goal of this process is to allow all co-chairs to learn about the proposed new work and to identify a sponsoring Work Group (if the project doesn't already have one) and other interested parties. Once a sponsoring Work Group is identified, the next step is the creation of a Project Scope Statement (PSS) - see How to Create a PSS PILOT v2.

This starts the overall process that includes:

- Creation of the Project Proposal
- QC Review/Curation by HL7 Staff and TSC Sub-group
- Notification to Co-chairs for review
- Triage/Curation by HL7 Staff
- Escalation to TSC (if necessary)
- Final disposition of the Project Proposal (Reject or Assign to a Sponsoring Work Group)

Process Flow

This process covers the Project Proposal work flow.

Quick Reference

1. Create Project Proposal using Confluence link (Step-by-Step Creating a Project Proposal: Step 1-3)
2. Submit (Step-by-Step Creating a Project Proposal: Step 4)
3. Send to Review (Step-by-Step Send to Review: Step 1)
4. Complete the review by your group (Step-by-Step Reviewing a Project Proposal - Step 1-4)
5. Review and reconciliation of comments (Step-by-Step Review and Reconciliation of Comments - Step 1a-c)
6. Assign to a sponsoring Work Group or reject (Step-by-Step Guide: Triage to assign to a sponsoring Work Group or reject: Step 1-3)

Step-by-Step Guide - Creating a Project Proposal

1. Navigate to the Project Proposals space
2. Select the "Draft New Project Proposal" button
3. Complete the Project Proposal Form
   a. Enter the Summary of your project - be descriptive - this will be what reviewers see in the notification email and the description of your project
   b. Enter the Description of your project - please ensure that sufficient information is provided so that reviewers understand the intent of the project. Also include a statement of how much of the requirements and/or content have already been developed.
   c. Enter the Email address of the project proponent
   d. Select the potential Sponsoring Work Group or select "to be determined" if unknown
   e. Enter in the target ballot cycle (if known)
4. Click on Submit. This will create an issue in JIRA.

5. Navigate to the JIRA link that is displayed once you click submit.
6. Click Submit to transition the proposal to the next step

7. The Project Proposal will now proceed to the review stage starting with curation by HL7 Staff.

Step-by-Step Guide: Send to Review (Curator)

1. HL7 Staff and TSC Leadership will review the Project Proposal to ensure it is complete and ready to be review and verify that identified sponsor(s) are appropriate for the project.
   a. Once the review is complete, click on SEND to REVIEW

Step-by-Step Guide - Reviewing a Project Proposal

1. Follow link in email to parent issue in JIRA you are being asked to review.
2. Review the issue using the following questions to guide you:
   a. Potential Sponsoring Work Groups (will be identified the Sponsoring Work Groups field as well as noted in the email)
      i. Does this project fit into my Work Group's Mission and Charter?
      ii. Is my Work Group willing to sponsor this project?
      iii. Is there an ongoing project(s) in my Work Group that are similar to this one that may overlap? If so, provide details in your comment.
      iv. Is there a project(s) underway in other Groups that are similar to this one that may overlap? If so, provide details in your comment.
      v. Are you aware of a project(s) outside of HL7 that may overlap with this project?
      vi. What other Work Groups should be considered as co-sponsors or interested parties?
   b. Other Work Groups
      i. Does this project fit into my Group's Mission and Charter and should we be a sponsor, co-sponsor or an interested party?
      ii. Is there an ongoing project(s) in my Work Group that are similar to this one that may overlap? If so, provide details in your comment.
      iii. Is there a project(s) underway in other Groups that are similar to this one that may overlap? If so, provide details in your comment.
      iv. Are you aware of a project(s) outside of HL7 that may overlap with this project?
      v. What other Work Groups should be considered as co-sponsors or interested parties?
3. Create a comment in the Project Proposal

- Project Scope Statements/Proposals / 935-1848

New Project Proposal for testing

- Details
  - Type: Project Proposal
  - Status: To Be Determined
  - Resolution: Unresolved
  - Priority: Medium
  - Labels: None
  - Sponsoring Work Group: To Be Determined
  - Project Description: New project proposal for testing
  - Email: nehu@rsnetsnconsulting.com

- Description
  - None

- Attachments
  - None

- Activity
  - Comments
    - History
    - Activity
    - Transitions
    - There are no comments yet on this issue.

  - Comment

a. In your comment you can
  - i. You can ask for more information from the Project Proponent
  - ii. Accept being the sponsoring Work Group
  - iii. Reject being the sponsoring Work Group
  - iv. Identify your Work Group as a co-sponsor or an interested party
  - v. Comment on the project itself - based on the guiding questions above

4. Enter the details of your comment and click "ADD"

Step-by-Step Guide: Review and Reconciliation of Comments

1. Project Proponents are expected to review and reconcile comments throughout the review cycle. You may receive an email from HL7 Staff to complete your review and reconciliation if it is not complete when the review period ends.
   a. To do this, review the comment and determine the appropriate action
   b. Complete the identified action
      - i. The project description, identified sponsor or target ballot may be updated
      - ii. Reply to the comment with a response that does not require an update to the project proposal
   c. Add a comment on what action was completed
Step-by-Step Guide: Triage to assign to a sponsoring Work Group or reject (Curator)

1. At the end of a 2 week period, HL7 Staff will TRIAGE the Project Proposal to determine if comments have been received.
   a. If no comments or limited comments have been received or if there is not Work Group willing to be the sponsor, the review period will be left open for another 2 weeks and a reminder email will be sent out.
   b. If there are comments that have not been resolved by the Project Proponent, an email reminder will be sent out.
   c. Otherwise, the Project Proposal will be triaged - select Triage

i. Once triaged, the following options are available:
   1. Escalate to TSC Leadership - Status = TSC Exec
      a. if no comments received and no sponsor identified
      b. if comments received but have not been reconciled
   2. Accept - Status = Accepted
      a. if sponsoring Work Group has been identified and all comments have been reconciled
      b. if TSC has assigned a sponsoring Work Group
   3. Needs Revision - Status = In Review
2. If the proposal has been escalated to TSC - click Escalate to TSC Leadership

3. a. Options include
   i. Accept - to assign to a sponsoring WG
      1. Create a comment with the decision and click "ACCEPT"
   ii. Reject - to reject the project
      1. Create a comment with the decision and click "REJECT"
   iii. Needs Revision - to push the project back for review
      1. Create a comment with the request for more information and click "NEEDS REVISION"