

# Guidelines for Phase 2 Projects

## Guidelines for Phase 2 Projects

Use these guidelines to as a roadmap to plan, document and evaluate your project.

### Project Life Cycle

- Discuss project in your team and with your liaison if desired.
- Scope and Prepare Project Proposal for TSI Steering Committee using these Guidelines as appropriate.
- Manage and document the project, consulting with your liaison as needed.
- Assess Project for success or failure for TSI Steering Committee.
- Record project outcome in the [Proof Registry](#)

### All Projects

1. Determine whether project is complex. Does it have financial, significant staffing, or political implications? Does the project need to access patron or financial data? Does it require reassigning staff or changing a job description?
2. Name project with a short referable name.
3. Develop a communications plan.
4. Determine accountability, oversight, dependencies and involved staff.
5. Determine timeline and any deliverables.
6. Consult [Guidelines for Measuring or Estimating Costs/Benefits for TSI Phase 2 Recommendations](#)
7. Use appropriate Methodology for Measuring Work Across Functional Areas, e.g., CUL Currency or MOU.
8. Prepare proposal with brief outline of what the project will aim to achieve and submit to TSI Steering Committee.
9. Document your project as you go using a wiki, Basecamp, or Google Docs.
10. Prepare a final report for TSI Steering Committee.
11. Assess Project and record outcome in the [Proof Registry](#)

### Complex Projects

In addition to above:

- If the project requires an MOU or any financial expenditure, consult with TSI Steering Committee.
- Does the Project impact other areas of the library? If so, consult with TSI Steering Committee.
- Does the project require access to patron or other confidential data? If so, consult with TSI Steering Committee.