

### Project Phases and Vision Docs

**What is a Project?** A collaborative new initiative, event or significant change in strategy created to accomplish a desired goal.

**What are Project Phases?** The systematic process, with Staff Cultural Values and RACI as foundations, of getting the right people around the table to accomplish a desired goal.

**What is a Vision Doc?** A one-page resource equipping all staff with broad project vision. *Template attached.*

**What is a Roll Out Doc?** A comprehensive resource equipping the execution team with specific project details. Available to all-staff as requested. *Template attached.*

**What is a Project Plan?** The Vision Doc and Roll Out Doc combined. Posted on CreekHelp.

<b>Idea</b> <ul style="list-style-type: none"><li>• <i>Why are we doing this?</i></li><li>• <i>What data or research supports this?</i></li><li>• <i>What resources are needed?</i></li></ul>	<ol style="list-style-type: none"><li>1. Create a Vision Doc</li><li>2. Share idea with Direct Report.</li><li>3. Consult with appropriate Senior and Executive Directors to determine if the project should progress and/or identify next steps.</li><li>4. Name a Mangement-Level Project Lead.</li></ol>
<b>Input</b> <ul style="list-style-type: none"><li>• <i>Who needs to be around the table?</i></li><li>• <i>What needs to be decided?</i></li><li>• <i>What needs to be done?</i></li></ul>	<ol style="list-style-type: none"><li>1. Project Lead works with their Project Manager to build project in Teamwork.</li><li>2. Project Lead develops a Project Team with needed perspectives and explains who they represent.</li><li>3. Project Team collects Input from needed teams.</li><li>4. Project Lead begins to create a Roll Out Doc and consults with their Executive Director.</li></ol>
<b>Development</b> <ul style="list-style-type: none"><li>• <i>Who needs to know what?</i> <i>Are all resources ready for Roll Out?</i></li><li>• <i>Are all teams equipped for Roll Out?</i></li></ul>	<ol style="list-style-type: none"><li>1. Project Lead submits an Arts Request (if needed)</li><li>2. Project Lead collaborates with needed people/ teams to make decisions.</li><li>3. Project Lead finalizes Roll Out Doc.</li><li>4. Project Lead communicates as appropriate:<ol style="list-style-type: none"><li>a. Vision Doc to All-Staff through Exec Summary</li><li>b. Roll Out Doc to execution team</li><li>c. Project Plan posted on CreekHelp</li></ol></li><li>5. Project Lead ensures those executing are equipped for Roll Out.</li></ol>
<b>Roll Out</b>	Project is executed.
<b>Evaluation</b> <ul style="list-style-type: none"><li>• <i>What worked?</i></li><li>• <i>What didn't?</i></li><li>• <i>What happens next?</i></li></ul>	<ol style="list-style-type: none"><li>1. Project Lead triggers evaluation through Project Team to appropriate people and teams.</li><li>2. Project Lead collaborates with Project Team and the appropriate. Senior and Executive Directors to determine next steps.</li></ol>

## **1. VISION DOC TEMPLATE**

### **Bottom Line**

- 2-5 sentence project description; thesis statement.
- Why are we doing this?
- What problem are we trying to solve?

### **Goals**

- How does this support our mission?
- What do we want to accomplish?

### **Broad FAQ's**

- What big-picture, initial questions, will be asked?
- What questions do all-staff need to be equipped to answer?

## **2. ROLL OUT DOC TEMPLATE**

### **When**

- Date and Time
- What led to this decision?

### **Where**

- Location
- What led to this decision?

### **Branded Name**

- What are we calling this?

### **Promotion Strategy**

- How will we promote this? Strategy and timeline.

### **Execution Details**

- What will this look like?
- What programming elements are included?
- What will be uniquely significant? (Food/Swag/Content, Etc.)

### **Staff Role**

- How will the execution team be equipped?
- What will the execution team be responsible for?

### **DreamTeam Role**

- What will they need to know and do?
- Who will equip them?

### **FAQ's**

- What significant questions will Staff, DreamTeam and guests ask?
- Help to bring talking points and clarity to the project.