

SAMPLE Project plan: Racial equity conversation tool

Purpose

Equip staff to lead conversations with external stakeholders that help them understand and invest in Greater Twin Cities United Way's racial equity strategies.

Roles (following RASCI framework)

R responsible	Sr. manager, donor services	Create plan; project manage; collect input; write content; collect and integrate feedback; maintain future document updates
A accountable	VP, philanthropy	Provide requirements; review round 1 and round 2; hold final-approver role on plan, roles, and content
C consulted	CEO	Review final tool
	VP, DEI	Provide input; review round 2
	Senior donor advisor	Provide input; review round 1
	Director, fundraising	Provide input; review round 1
	Director, communications	Provide input; review round 1 (also compiling review from full comms team)
	Business relationship officer	Review round 1
	Campaign manager	Review round 1
	AVP, community impact	Review round 2
	Content manager, community impact	Provide input; review round 1
	Director, advancement strategy	Consult on process throughout
I informed		Upon project kickoff: VPs and directors
		Upon delivery: All staff

Phases and activities

Planning	By 10/27	<p>Sr. manager, donor services: Seek plan approval from VP and seek consent from all consulted people</p> <p>VP: Provide input on plan and roles</p>
Input	By 11/5	<p>Sr. manager, donor services: Gather input in sessions with consulted roles</p> <p>Sr. manager, donor services: Inform "I" stakeholders of kickoff</p>
Round 1 content	By 12/10	<p>Sr. manager, donor services: Draft recommended content; route to round 1 reviewers</p> <p>Round 1 review window: Dec. 6-10</p> <p>Round-1 reviewers: Review and provide feedback</p>
Round 2 content	By 1/12	<p>Sr. manager, donor services: Integrate feedback and circulate content for final review</p> <p>Round 2 review window: Jan. 4-10</p> <p>Round-2 reviewers: Review and provide feedback</p> <p>Sr. manager, donor services: Integrate final feedback and deliver to VP, in a 25-minute session to walk through how final feedback was integrated and invite any last tweaks</p>
CEO review	By 1/25	<p>Sr. manager, donor services: Provide final tool to CEO for review and approval</p> <p>CEO review window: Jan. 14-21</p> <p>CEO: Provide feedback or approval during 1-1 with VP</p> <p>Sr. manager, donor services: Integrate CEO feedback and share final language with VP in a 15-minute check-in to resolve any questions.</p>
Delivery	By 1/27	<p>Sr. manager, donor services: Publish on fundraising resources page</p> <p>Leadership: Plan rollout in all-staff with presentation and breakout room discussions</p>