



StEPs-UT PILOT | PROJECT TEAM & TIMELINE MANAGEMENT TEMPLATE

Keep track of tasks necessary to implement your project

Designate SPECIFIC roles, responsibilities, and timelines required to accomplish these tasks

PROJECT

Museum Name:	
StEPs Module:	
Project Name & Description:	
Project Date Range:	

ROLES & RESPONSIBILITIES— *try to spread responsibility to team members as possible*

Name 1:	Overall project manager
Name 2:	Mentor
Name 3:	[Roles and responsibilities for this project]
Name 4:	[Roles and responsibilities for this project]

TIMELINE – *use existing workshop and mentor meeting dates as deadlines, then fill in interim activities as needed*

Task	Owner	Helper(s)	Start	Due	Status	Notes
<i>Workshop – Month 1</i>				[workshop date]		
<i>Workshop – Month 2</i>				[workshop date]		
<i>Mentor Site Visit – Month 3</i>				[workshop date]		
<i>Workshop – Month 4</i>				[workshop date]		
<i>End of Module</i>				[last day prior to start of next module]		

Tasks Related to this Project to be Undertaken Beyond the Module Window (Next Steps):



FICTIONAL EXAMPLE

StEPs-UT PILOT | PROJECT TEAM & TIMELINE MANAGEMENT TEMPLATE

Keep track of tasks necessary to implement your project

Designate SPECIFIC roles, responsibilities, and timelines required to accomplish these tasks

PROJECT	
Museum Name:	Central Utah County Museum
StEPs Module:	Mission Vision Governance
Project Name & Description:	Creating Baseline MVG Documents: Work with board, volunteers, and staff to create Vision and Mission Statements based on vision exercise, revise Code of Ethics.
Project Date Range:	July 30 to November 23, 2018

ROLES & RESPONSIBILITIES – try to spread responsibility to team members as possible	
Megan:	Overall project manager, board and mentor liaison
Pam (mentor):	Help team and board understand relevance and connections, point to resources, help prioritize
Emily:	Research - gather existing content from files, document gaps and issues, research best practice
Jennifer:	Writing and manage editing process
Penny (volunteer):	Administrative support as needed

TIMELINE – use existing workshop and mentor meeting dates as deadlines, then fill in interim activities as needed						
Task	Owner	Helper(s)	Start	Due	Status	Notes
<i>MVG Workshop – Month 1</i>				7/31	done	Decided on projects for this module
Schedule vision exercise with board, staff, vols, stakeholders	Megan	Penny	8/1	8/24		Board meeting not until later this month
Gather existing documents from files (mission, code of ethics, etc.)	Emily		8/1	8/17		
Gather examples from other orgs	Emily	Pam	8/1	8/17		
Review existing docs for gaps and issues	Emily	All team	8/20	8/24		
<i>MVG Workshop – Month 2</i>				8/27		
Conduct vision exercise	Megan	Pam		8/31		Megan convenes / Pam facilitates
Draft Vision & Mission Statements	Jennifer	Pam	9/4	9/7		
Circulate V & M for Review (round 1)	Megan	Penny	9/10	9/14		Comment Deadline 9/14
Edit V & M based on review comments	Jennifer	Megan	9/17	9/21		Have draft ready for Pam site visit
<i>Mentor Site Visit – Month 3</i>				9/24		
Circulate V & M for Review (round 2)	Megan	Penny	9/25	9/28		Comment Deadline 9/28
Final edits on V & M statements	Jennifer	All team	10/1	10/12		Present at MVG workshop
<i>MVG Workshop – Month 4</i>				10/29		
Draft Ethics revisions	Jennifer	Emily	10/15	11/2		
Circulate for Review	Megan	Penny	11/5	11/16		
Final edits on Code of Ethics	Jennifer	All team	11/19	11/23		
<i>End of Module</i>				11/23		

Tasks Related to this Project to be Undertaken Beyond the Module Window (Next Steps):

- Get vision and mission statements, and revised code of ethics approved by county commissioners and board
- Board Manual (including approving draft board job descriptions and committee roles, bylaws review)
- Plan to implement a strategic planning process – will need to raise funding to pay for a facilitator