Common Fact Base template (for GitHub)

### What is a common fact base?

A comprehensive set of information that allows all stakeholders (past, present, and future) to have a shared understanding of important facts and information about a given problem, project, or decision.

|  |  |
| --- | --- |
| **How to use this template:**   * Select File > Save as... * You can also select File > Export and choose from other file formats, including .ODT * You could copy and paste or import it into a wiki page or collaborative platform (e.g. GoogleDocs) * Fill out all applicable fields. * Customize as needed. Delete the tips, unused sections, etc. * Publish early and update often.   + You could incorporate it into an existing project wiki or website.   + As your project or decision progresses, continue to build out new sections and add details. You might want to break this into smaller documents. * Use collaboration and feedback features to support your open decision making process, e.g. comments, polls | **Make it comprehensive, yet consumable.**  Use the [Inverted Pyramid](http://www.s8080blog.com/tag/inverted-pyramid/) method to organize content:  pyramid-style-of-content.jpg    **Have a project charter?**  If you completed a [project charter](https://www.smartsheet.com/blog/project-charter-templates-and-guidelines-every-business-need), publish it as the first piece of your common fact base. As your project progresses, build your common fact base by adding info suggested in this template. |
| **Decisions to make before publishing:**   * Where will you publish? The ideal place is:   + easy for your project team to update and manage   + easy for your stakeholders to access and navigate * Who will be able to view this and other documents?   + At Red Hat, we default to open. If there's no good reason to restrict access, we try to make it visible to everyone.   + That said, organizational cultures and norms vary, so make sure your project sponsor and team are comfortable. Discuss the risks and benefits.   + For highly sensitive projects, consider slowly opening access in concentric circles.   + If a project is "sensitive" simply because people may react negatively, you can build trust and respect (and [give people time to navigate the grief curve](http://www.whatnextconsultancy.co.uk/blog/managing-change-change-curve.aspx)) by being open from the start. | |

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# [Name of your decision or project]

## Problem

Problem statement *(1 - 2 sentences)*

* Learn more *(link to details below)*
* Problems we're not trying to solve *(link to ever-growing list)*

### Objectives

* What you want to do about the problem, in broad terms. Desired future state.
* What "good" would look like, in 1 - 2 sentences that anyone can understand.
* May not be needed, if captured in problem statement.

### Who may be impacted

* Hint: they're usually your stakeholder groups and potential stakeholder groups

## Timeline

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Phase** | **Ideation + Research** | **Prototyping + Testing** | **Development** | **Launch** |
| Timing | Jan - May 2017  *\* complete \** | Apr - Jun 2017  *\* in progress \** | Jul 2017 - Aug 2017 | Sep 2017 |
| Milestones | * Gather ideas from stakeholders *(link to details on ideation process + ideas gathered)* * Identify up to 5 potential solutions | * Build prototypes * Document limitations * Select solution for full development | * Develop and harden solution * Identify launch risks | * Roll out solution * 30 day survey |

* View detailed timeline and project plan *(link to details, e.g. view-only smartsheet or other document)*
* Link key milestones in timeline to relevant documents and details, where people can learn more.

### What's happening?

* Latest status update goes here
* Learn more

### Make your voice heard

Questions? Ideas? Here's what to do:

* List feedback + collaboration channels; highlight opportunities to provide input (e.g. surveys, join focus group, comment on this page)
* Share feedback loop
* Share decision-making process
* Explain how to stay informed
* Learn more

## Team

(Could also be titled "Roles + responsibilities")

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Executive sponsor** | **Project sponsor** | **Project owner** | **Stakeholders** | **Contributors** | **Questions?** |
| Name, title, team, contact info, etc. | Name, title, team, contact info, etc. | Name, title, team, contact info, etc. | Name, title, team, contact info, etc. | Name, title, team, contact info, etc. | Comment on this page. Or contact so-and-so. Whatever you want them to do. |

## Open decision making targets

Based on our project team's experience and the scope of this project, we are aiming to demonstrate the following [maturity levels](https://github.com/red-hat-people-team/open-decision-framework/tree/master/maturity-model) as we apply the [Open Decision Framework](https://github.com/red-hat-people-team/open-decision-framework):

|  |  |  |  |
| --- | --- | --- | --- |
| **Communication** | **Transparency** | **Release early + release often** | **Collaboration** |
| **ESTABLISHED** | **TRANSFORMATIVE** | **ESTABLISHED** | **TRANSFORMATIVE** |

# What we've learned so far

* Shift the wording of headlines like these, as your project progresses

## Possible approaches

* In the early stages, list any option or solution under evaluation or consideration.
  + As your project progresses, update heading (e.g. "Approaches we're testing," then "Proposed solution")
* Learn about other solutions considered *(link)*

## Business requirements

* High-level, most important requirements (up to 5)

## Constraints

* Key constraints on the decision or project
* Include relevant legal, reporting, confidentiality, etc. factors (to the extent possible)

## Assumptions

* This is where you'll want to state the obvious (and invite others to question your reasoning). Need help?
  + [Requirements vs. constraints vs. assumptions](http://www.bridging-the-gap.com/ba-stories-its-not-all-requirements-assumptions-and-constraints-matter-too/)
  + [Have You Checked Your Assumptions Lately? | Inc.com](https://www.inc.com/robert-kaplan/have-you-challenged-your-assumptions-lately.html)

## Risks

* Known risks, potential areas of controversy, cultural impacts, unintended impacts

## Decision criteria

* High-level, most important criteria
* Weighted importance

### Scope

* Clearly define what's in and out of scope. Link to details explaining why, if needed.

### Tradeoffs

* When you have to give up something to gain something better, explain it here

### Revisiting this decision

When do you anticipate revisiting this decision? Timeline or criteria or key factors that would contribute.

### How to provide feedback after launch

* Think about this, then include some version in your fact base at each phase of the project, to demonstrate your willingness to own the outcome of the decision

## Research

### Feedback gathered

* Summarize + link to details
* Changes made based on feedback
* Changes not made, despite feedback (and why)
* Prototype + user testing results
* Post-launch feedback and metrics

### Data and findings

* Summarize + link to details

# Background

### History + context

This is probably the first paragraph of your first draft or launch communications. Sorry, it belongs down here.

### About the problem

The super detailed version of the "Problem" section goes here.

Problems we're not trying to solve:

* Related problems that you know people will ask you about
* Related things you wish you could solve, but cannot
* *Optional, but can be very helpful to include*

Detailed business requirements

* Requirement #1 *.* Details here to help others understand it.
* Requirement #2. Details here to help others understand it.
* *Order from most to least important. Include info like weighting, relative importance, etc.*
* *Link to detailed requirements documents, if it's complex.*

How we gathered the requirements

*Explain the process and stakeholders you worked with, external research, etc. Helps validate them.*

* *Link to detailed data, survey results, etc.*

### Other solutions considered

(could provide a solutions evaluation matrix, instead)

Eliminated early on

* Name + why
* Name + why

Eliminated later in the process

* Name + why
* Name + why

Good solutions that we didn't move forward with

* Name + why (e.g. higher cost, might reconsider in the future, etc.)