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"This is a living document evolving together with our invisible Diamante Bridge Collective structures"

please leave your comments, questions or insights

PROPOSAL AND PROJECT PROCESS

(from creation to celebration)

Introduction:

This document serves as both introduction and guidelines for anyone who desires to understand the process necessary to create and submit proposals and outline projects within Diamante Bridge Collective. Proposals and projects are an important tool for implementing new ideas, solving issues or requesting funds from the DBC foundation.

The Diamante Bridge Collective (DBC) is a network of autonomous individuals and communities united in a shared vision and mission of land stewardship and human equity. This collective is self-governed and makes decisions together following a sociocratic model. The programs being developed are local in focus yet also designed to bridge neighboring bioregions and those who share similar initiatives worldwide and support those who travel between them.

We work together to create collective foundational agreements and a local regenerative economy that includes digital currencies for the transparent and accountable recordkeeping of our exchanges.

Sociocracy defined

Sociocracy, also called **dynamic governance**, is a system of governance that seeks to create psychologically safe environments and productive organizations. It is distinguished by the use of consent, rather than majority voting, in discussion and decision-making by people who have a shared objective or work process.

Sociocratic governance includes the creation of circles that align with the missions and objectives of the organization. Proposals are put forth within the appropriate circle to advance an idea, request a decision, or to approve a project by the people who are responsible or affected by the activity.

If you are interested to learn more about sociocracy, click here.

Basic definitions:

What is a Proposal?

A Proposal is a request to meet a need, harness an opportunity, or solve a problem that is brought forth by an individual, circle, or group. Proposals can be made in verbal or written form depending on the complexity of the request.

A proposal may be as simple as a DBC member requesting compensation for fixing one of the DBC trucks. A clear request such as this may be passed quickly by obtaining agreement within appropriate governing circle meetings.

A proposal requiring more input and time will need to first go through the “Advice Process” to raise awareness, identify impacted parties, and obtain additional perspectives. Examples include requesting a consistent budget for a new role, a building request or the offering of a new system of tools to support the whole community. Proposals that need to provide clarifying information are subjected to an advice process to solicit objections and work toward agreement. This is to ensure that all voices are recognized when making decisions that have a larger impact on the whole.

What is a Project?

A project is defined as a sequence of tasks that must be completed to attain a certain outcome. The term Project refers to ”any temporary endeavor with a definite beginning and end”. Depending on its complexity, it can be managed by a single person or hundreds.

A Project relative to the Diamante Bride Collective and its agenda is understood as a community-oriented project requesting funds, DBC assets, tools, or work crew.

Examples of DBC projects (on Giveth):
https://giveth.io/project/Commons-Infrastructure-Road-0

https://giveth.io/project/Free-The-Food-0

https://giveth.io/project/RECenter-the-Resource-Recycling-Center-San-Salvador-0

When do I create a proposal?

Proposals can be created verbally or in written form when there is a new idea, need, opportunity or community issue, or when requesting financial support from either the DBC itself or the public via the use of the Giveth platform.

When do I create a project?

A project can be officially created and approved once it has successfully passed through the proposal process. All projects begin as proposals and are adjusted for collective consent. At this point, they become actionable and can be executed or placed on the Giveth platform in order to raise funds.

What is the difference between Proposal and Project within DBC?

Simply said, the proposal process is to be used when we desire to implement new protocols, ideas, solve simple or complex issues or request resources from the Collective. Many proposals can be born and

completed without becoming projects. If a proposal requires funding and support outside of the DBC, or it will be an ongoing process, it must become a project.

What is a Proposal or Project Champion?

Every proposal and/or project needs its own champion before it can move forward. A champion is an individual willing to take responsibility for being the proposal's main voice/contact point, and who will ensure that things are moving in the right direction. The only time this does not apply is when the proposal and approval process is simple enough to be done verbally.

What is a Proposal or Project Admin?

Every proposal and/or project needs its own champion and that champion may also need administrative support (described below). The administrator ensures the whole process is monitored, tasks are assigned and the process is tracked accordingly. The only time this does not apply is when the proposal and approval process is simple enough to be done verbally.

Now, let's give you some guidelines!

A Proposal and its Life Cycle

Introduction

Every proposal has its own life cycle defined by a definite beginning and end, and therefore requires a champion who will make sure that the proposal is running in the right direction and reaches the end of the cycle.

Proposals can be made **verbally** (form your verbal proposal using our Proposal Template as a guide, present to the circle requesting, and get the vote) or in **written** form (follow the proposal life cycle guidelines presented here, present it to the circle, and call in a forum discussion).

When creating a proposal, there are some important steps to keep in mind for the proposal to be passed as gracefully as possible. Remember, you want to be brief, concise, and agile.
Here are the steps that occur in the life cycle of a proposal and how to request your needs to be met in a Sociocratic system:

1. Driver Idea and Initiation
2. Proposal and Body creation
3. Decision process, Bring it to the Collective
4. Proposal Resolution
5. Proposal Action
6. Evaluation and Celebration

1. Driver Idea and Initiation

At the beginning, there is an Idea. What are we looking to propose? Is it a need, new idea, opportunity, issue, or request? Before any proposal can be created and brought forth to the collective, an individual or group first must define the driver idea. The Driver is to be well defined, and clearly state the problem or need they wish to find resolution and how it will benefit the collective.

It is important in this stage to understand your WHY, also understanding the common ground as well as the common differences in the collective. Identifying aspects of the 'matter' (picture forming) will help members create a more thorough proposal.

Here we can collect questions and considerations relating to various community needs, desires, possible objections, and to possible solutions. This is most efficiently done by presenting the driver and forming questions relative to the driver.

Questions formed can either reveal possible constraints or possibilities, which if answered clearly can help move along the proposal process more efficiently.

2. Proposal and Body creation

Creating the actual proposal comes in place when we have all the available information ready for the proposal *body* to form. Make it feel as simple and objective as possible.

Using our DBC Proposal template is a necessity, and will help to guide you together with this document through the process of creation. First thing first, who is the Proposal Champion?

Champion is a person who takes responsibility for being the proposal's main voice/contact point, and will make sure that things are moving in the right direction. With a written form of proposals, you will need to find your *Admin.*

Admin will be a person, who makes sure the whole process is monitored, tasks assigned and tracked accordingly via the DBC tracking tool so that we can effectively pass proposals in a timely manner within appropriate circles.

It is safe to say that verbally passed proposals do not need admin,
a) because they are already recorded by a scribe at the meeting where being voted on
b) any task assignments happen to take place verbally in the meeting.
That said, admin is not needed.

However, if your proposal needs to be presented in written form, most likely you will need an Admin alongside the Champion. Are you the Champion? To find your Admin, ask at the circle about who fills in

this role for tracking proposals via the tracking tool. Your Admin will be the right person in the right circle.

Now that the Driver Idea is clearly defined, Champion is known, questions for the circle being formed, we choose one of the two following methods to continue with the process:

Method 1: The Proposal is initiated **verbally** and voted on when 100% of the authorized Council is present together physically/virtually or has delegated their position on the Proposal to another DBC member present.

Method 2: The Proposal is initiated by **written** form by making a copy of the Proposal Template in the Diamante Bridge Proposal Folder and submitting the proposal to all affected Circles for review by uploading to the forum: https://forum.diamantebridge.org/

Here Is a link to the Proposal Template in DBC DOCS. **Do NOT** write your proposal in please - copy and paste to make a new one for editing.

3. Decision process. Bring it to the Collective

Once the proposal is formed, initial questions have been asked and answered, and possibilities have been clearly discovered, it's time to bring it to the collective and seek advice from all members. The proposal gets status as ACTIVE/PENDING, its final destination is called APPROVED/REJECTED. After receiving objections and advice from the collective via forum discussions, we seek a vote by the council of related governing circles under which our proposal falls into.

A proposal is brought to one of the DBC circles and its council. It will either be voted on to pass, or objections and questions will arise which are to be addressed until consent is reached.
When seeking consent from any circle, we need to focus on three groups of people we want consent from:

a) Those who will be significantly impacted
b) Those who are expected to pay for the work
c) Those who will be providing the work

4. Proposal Resolution

A Proposal will be Positively Resolved when 100% of the authorized Council members are present and consent, at least, not to undermine (good enough for now, safe enough to try) the implementation of the Proposal. The Proposal must answer all objections in order to come to consent within the community.

Any objections must be met and worked through within the circle to come to a consensus.
A more complex Proposal is iterated by editing the Proposal Document, making comments, and/or using suggestion mode. When the Proposal has reached a state of no objections from the Circle or Council, it may be added to the agenda for community resolution.

Common bumps on the road are that people want to argue about assumptions made in surrounding facts or background that don't really matter in terms of consenting to the proposal itself. It is very important for proposals to be really clear about what is context and what is actually being proposed.

During this stage, it is important to work in tandem with your Admin who will help your proposal to stay on track and manage the proposals life cycle using the right admin tools.

A Vote will occur for any proposals brought to a circle and council and if no objections are heard, the proposal will be passed and ready for its next stage!

5. Proposal Action

Yay! Your proposal passed a vote and has been approved by DBC. Congratulations! Now you can take action. Make sure that when you reach this stage, your team is ready to act in accordance with what needs to be done in order to distribute provided resources such as funds, tools, or community support. This includes the group or individual being provided with any funds, tools or community support it needs to successfully implement the proposal which was agreed upon.

Note: if your proposal is intended to become a project under DBC that requires outside funding and will be uploaded on the Giveth platform, jump into the Project Life Cycle section below to learn about guidelines for creating a successful fundraising project.

6. Update - Report

Update and report about your success and actions, and celebrate together.
Updates and storytelling are just as important as the process of creating a proposal and getting it passed. Share with us your story and provide the community with updates, pictures, and videos of what we have successfully created!

A Project and its Life Cycle

(paste project cycle picture)

Introduction

In DBC terminology, a Project stands for an initiative that requires resource allocation, schedule planning, and coordination of activities to complete. It may be fully resourced from within the Collective, or it may require outside funding, in which case it can be listed on the Giveth platform as part of the DBC. A project has already lived its own Proposal life cycle and has been approved by the council. The Project Champion is known as well as the Admin who helps with checklists and tasks, and perhaps there is even a whole team!

Now you need to call in your DBC media and project update team support (Lala and Nikola) and create the story together. Your project is born, one day will mature, and at some point, eventually, dies when the cycle is complete.

Inside the DBC Project Life Cycle, there are four process groups that come together to create the cycle:

1. Initiation, Introduction, and Planning
2. Executing
3. Monitoring and Controlling
4. Closing

1. Initiation, Introduction, and Planning

What needs to be done? Lay out the road map and dream together. It’s time to present your project to the world outside.

Kick off with your team and get their commitment. Bring together all of the available information to one document on Google Drive, ask your media person (Lala) to create a project folder for you, and make sure that this document will include information extracted from the FINAL approved version of your original Proposal with defined PROJECT SCOPE, COST, AND RESOURCES. From this detailed document, you will be able to create your brief project description and track your journey from the very beginning as you start writing a new story.

What do we need to INITIATE?

Action towards receiving resources first - Create your official project description using your detailed document as a source following Giveth Project Creation Guidelines
https://docs.giveth.io/dapps/gettingStarted/

The goal is to take a loose brief of a project and define it in terms of what it needs to strategically do and achieve in order to be successful and worthwhile.

What do we need to INTRODUCE?

Introduce your project to one another, to your community, and to the rest of the world! Learn how to set up your own crypto wallet and enter the world of philanthropy where giving is effortless.

What do we need to PLAN?

Before we receive any resources, we want to make sure that we know:

a) what needs to be done and how to do it
b) what exactly are we going to do
c) how are we going to do it
d) when are we going to do it
e) how will we know when we are done
f) how will we know when the project becomes self-sustainable

2. Executing

Your project received the resources needed? Finally, get to execute your awesome project plan! Call in your team meeting, bring resources on board, brief them set the ground rules, and introduce them to one another. Bring it to the circle by an announcement:).

After that, everyone jumps in to perform on the roles identified in the plan!

3. Monitoring and Controlling

(track the project to see if it does what it's supposed to)
While executing on the plan, we carefully monitor and document phases of execution. Keep the project on track. Creating regular updates, collecting photo and video documentation, and recording the 'story'.

We report performance. Monitor life, budget, and timelines by simply recording:

a) resources allocation - providing updates
b) success and learnings - providing updates
c) clearing obstacles - providing updates
d) reviewing estimates vs actuals, tasks completed against the time spent and remaining to ensure the project is going according to plan - providing updates

4. Closing

(deployment, evaluation, closure, and celebration)

How do we know we have reached the closing point for any Project life cycle? When we reach completion with our project plans and/or we see that project was integrated into the community and became self-sustained.
In this case, we hold a meeting for post-project review to discuss the strengths and weaknesses of the project and the team, what went great and what didn't go so well. How to improve in the future? This is one of the most rewarding stages of project management itself and a great opportunity to recognize one another and celebrate together!

"please leave your comments"