



NONPROFIT CLIENTS

ALUMNI CONSULTING TEAM (ACT)

WELCOME TO ACT, THE STANFORD BUSINESS SCHOOL'S ALUMNI CONSULTING TEAM. SINCE 1987 OUR ALUMNI VOLUNTEERS HAVE OFFERED PRO BONO CONSULTING SERVICES TO NONPROFITS IN THE SAN FRANCISCO BAY AREA. IF YOUR ORGANIZATION HAS A STRATEGIC PROBLEM, LARGE OR SMALL, THAT YOU THINK MIGHT BE SOLVED BY ACT, FIRST READ THIS OUTLINE OF THE ACT PROCESS, AND THEN GIVE US A CALL. WE LOOK FORWARD TO HEARING FROM YOU!

ACT offers two kinds of consulting projects: Full Team and Fast Track. Which category your project falls into depends on its complexity and the time it will take to complete. If yours is a Full Team project, you will meet with five to eight team members, led by a Project Leader, over a period of six to eight months. Fast Track projects involve one to three volunteers who will work with your organization for two to three months. Projects often address major organizational concerns and almost always focus on a specific issue.

No matter which kind of help you seek from ACT, the process is certain to place demands on you and your organization. ACT volunteers will need your help to get up to speed. They will need access to people and data in order to understand your operations and the challenges you face. They will ask difficult questions from different perspectives, and the conclusions they reach may be unexpected.

As one ACT client explained, "It's easy to ask for advice but not always so easy to hear it."

Are you ready? If so, let's get to work.

1. ASK ACT FOR HELP

The first step is to check if you meet the client criteria listed on the ACT website. If you do, you may begin the ACT process by submitting an Interest Form to the Alumni Consulting Team at the Stanford Graduate School of Business. An ACT representative (Project Screener) will ask you why you want to work with ACT and gather preliminary information about your organization. If your organization fits within ACT's guidelines and it seems likely an ACT team can be assembled with the skills needed to address your project, you'll be invited to complete an application.

You should be aware of our deadlines. ACT organizes pro bono consulting teams twice each year. To be considered for a Spring-Summer project, which begins in March, ACT must receive your application sometime in January. For a Fall-Winter project, beginning in September, applications are due in July. Check the ACT website for specific dates.

After reviewing your application, an ACT representative (Project Screener) will meet with you to discuss your project in more detail. If your project looks to be a good fit for you and our volunteers, we will prepare a Project Posting document (which you approve) to recruit project leader(s) and volunteers.

After successful recruitment, the Project Screener will contact you to set up a Sounding Board Meeting with you and the Project Leader(s) – or volunteers in case of Fast Track – to launch your project.

PROJECT DEVELOPMENT →

Objectives:

1. To provide more detailed information about your organization and consulting needs so that ACT can develop a successful work plan for you.
2. To identify and involve all key stakeholders responsible for ensuring the successful implementation of the ACT team's recommendations.

Key Challenges:

1. To balance your wish list against ACT consultants' interests, skills, and availability.
2. To determine organizational resources required to successfully complete the project.

End Result:

A project work plan you develop jointly with your ACT consultants.

2. DEVELOP YOUR PROJECT

In Full Team engagements your Project Leader is your primary contact throughout the project. He or she is responsible for understanding your organization's goals and needs. The Project Leader works with you to define priorities, creates a plan to guide the work of the consulting team, and manages the team.

At the Sounding Board Meeting be prepared to discuss your organization's mission, vision, and goals, its financial health and strategic plan. The Project Leader will want to talk with your Executive Director and your Board Chair. This is the point where you should think about connecting the Project Leader with the key stakeholders who will have to sign off on the team's recommendations.

During the project development phase, your ACT Project Leader will review your original application and work with your organization's management to understand your needs, determine what the ACT team can accomplish, and plan the steps the team will take to complete the project.

Be prepared to be challenged. Your Project Leader will dig deeper to understand both your organization's options and its readiness to change. Your assumptions and goals may be questioned. In fact, sometimes a nonprofit will come to ACT with a specific project in mind, but in the course of these early discussions, the project leader realizes that more fundamental issues need to be addressed before the project can be successful.

Developing the ACT team's work plan, which documents the project's objectives, key areas of investigation, and expected results, is an iterative process that requires the Project Leader to work closely with you to define the scope of the team's work. Throughout the course of the project it is essential that you stay involved and remain in close communication with the leader. The Executive Director, Board Chair and your ACT Project Leader must all sign the final work plan.

PROJECT EXECUTION →

Objectives:

To support ACT team consultants as they execute the work plan.

Key Challenge:

To respond in a timely manner to the team's need for data and access to staff, board, and external contacts.

End Result:

Timely sharing of written materials in response to team requests.

If you are applying for a Fast Track project and wondering how this applies to you, you should know that you will not be assigned a separate Project Leader. Your consultants will meet with you to discuss and plan your project's goals and timeline, roughly following the steps in this memo.

3. GO FOR IT!

Meet your team

A Kick-Off Meeting with your project team will be a critical part of the project – this meeting often takes place prior to the Work Plan being finalized. Your Project Leader has covered the territory, but in most cases, your team members will be new to your organization. The team will want to meet with you and possibly one or more of your organization's key stakeholders to hear your thoughts about the project and ask questions related to the work plan.

It will take time for the team to catch on to acronyms and terms that come easily to your staff and board. Invest your time early in the process to bring the team up to speed. Throughout the project, share materials in writing and be patient when you're asked to answer questions about your organization's work.

Stay involved

Your involvement is vital to success. In many cases, ACT consultants set aside a specific amount of time each month for your project and schedule their other responsibilities around it. Show that you value your consultants' time. Respond quickly to requests for information and prompt your board and staff members to do the same. If you believe the project might be getting off track, discuss your concerns immediately with the consultants or the ACT office. Openness and responsiveness throughout the process will ensure that the final outcome is worth your effort and the team's.

Follow the plan

Unless your consultants offer more time, honor the original scope and timeline of the project.

Mid-course review

Once the consultants have finished their research, they will present it to you, your staff, and your board representatives for feedback. Sometimes the team will pursue more research; at other times this mid-course review may change the project's scope or direction. At this time, your team will discuss how to best focus their efforts in the second half of the project.

Final report

To conclude the project, the ACT team will create an initial draft of its report (with findings, conclusions, and recommendations) for your review. Once the plan is refined to your satisfaction, the team will present its conclusions and recommendations to your management and Board of Directors.

PROJECT EVALUATION →

Objectives:

To provide closure and opportunity for feedback.

Key Challenge:

To begin implementation of team recommendations.

End Result:

Project assessments and feedback.

4. EVALUATE THE PROJECT

When the team has finished its work on a project, ACT asks Project Leaders, team members, and clients to complete a short survey providing feedback about their ACT experience. This is an important “final” step, but it shouldn’t mark the end of your involvement with ACT. After the evaluation is in, we hope you will:

Stay in touch with your team

ACT consultants want to know if their work is making a positive impact on your organization. Send them occasional updates about the project and invite team members to your organization’s events. If mutually desirable, use the ACT experience as a springboard for future relationships with Project Leaders and team members.

Plan a 12-month follow-up meeting

ACT encourages clients and teams to get together a year after the project is completed. This meeting offers you and ACT the opportunity to discuss what worked and what didn’t as you moved to implement the team’s recommendations.

If this description of an ACT project dovetails with your needs, please go back to Step 1 and fill out an ACT interest form online. If you have any questions, give us a call. You’ll find us at 650/736-1956 or info@stanfordact.org.