PROJECT LEADERS

AS AN ACT PROJECT LEADER, YOU STAND AT THE CENTER OF THE ACT CONSULTING Process—AND YOUR ROLE IS CRITICAL TO THE SUCCESS OF “FULL TEAM” PROJECTS—THOSE THAT REQUIRE LARGE TEAMS AND SIGNIFICANT TIME TO COMPLETE. YOU WILL GUIDE THE PROCESS FROM BEGINNING TO END: YOU WORK FIRST WITH THE CLIENT TO DETERMINE THE SCOPE OF THE PROJECT AND ITS DESIRED OUTCOMES, AND THEN YOU COORDINATE THE TEAM OF CONSULTANTS AS THEY EXECUTE THE PROJECT AND DEVELOP RECOMMENDATIONS BASED ON THE TEAM’S ANALYSIS. YOURS IS A CHALLENGING POSITION, BUT ONE THAT OFFERS PLENTY OF OPPORTUNITIES TO LEVERAGE YOUR LEADERSHIP AND PROJECT MANAGEMENT SKILLS HELPING A NON PROFIT AND YOUR FELLOW ALUMS ACHIEVE THEIR GOALS.

To help you understand the project leader role, this document will take you through the steps of an ACT project as well as the support ACT provides to ensure your success.

1. THE CLIENT TEAM IS FORMED

Non profit clients approach ACT with potential projects throughout the year. ACT alumni volunteers screen and select the most compelling projects. Those requiring 6-8 months or 5 or more alumni volunteers are “Full Team” projects and require a Project Leader or Co-Leaders to direct them.

Twice a year ACT recruits alumni to volunteer for the projects it has selected. It asks those who want to work on Full Team projects to also indicate if they would like to serve as Project Leaders who do the following:

- Build consensus around the scope of the project, overseeing the work of the team and project logistics, communicate with ACT staff and the client and guide preparation of the mid-course and final presentations.

- Choose to lead alone or serve with another alum as Co-Leaders pending a conversation to ensure your leadership philosophies are compatible and to agree on respective roles, e.g., one acting as the project manager and the other holding the client relationship.

- Work with ACT’s Staff Director to select a team from among the alums who have volunteered. Typically, you will speak with volunteers as part of the selection process to share their leadership style and expectations about team meeting schedule and location as well as determine each volunteer’s level of commitment,
how they see contributing and what they hope to gain by participating. Especially when there are more volunteers than are needed for a team the process of ascertaining the skill set of volunteers is critical to form a team of complimentary members.

2. YOU AND THE CLIENT SCOPE THE PROJECT

ACT now turns over the client relationship to you. Initially you will conduct a Sounding Board phase to ensure that the project can produce recommendations within a 6 month timeframe with the team selected and resources provided by the client that will materially help the client. ACT provides guidelines to help you do this. To accomplish the Sounding Board, you will meet with your client’s management to discuss the outcomes they envision and the deliverables that they would like to receive. You will understand their organization, the environment in which they operate, the bandwidth of the team and the help the client can provide. You may do this alone or involve the members of your team. If you uncover any issues, you’ll get ACT’s Staff Director involved to help resolve the situation.

3. EXECUTE THE PROJECT

The preliminaries are over. Finally the project begins.

Kick-off meeting

At the team’s initial meeting, you will:

• Brief the Project Consultants on project developments to date (including what you’ve learned from the Sounding Board you’ve done and any thoughts you’ve had in drafting a work plan)

• Establish project logistics such as meeting places and schedule, the file sharing site you plan to use as well as behavior norms team members need to follow, e.g., letting you know as soon as possible if they are unable to attend a meeting or meet a deadline.

• Ask team members to share their reasons for volunteering.

• Focus on determining steps necessary to finalize the work plan, to get buy-in and start to form sub-teams around various work elements.

• Set an example for how you’ll run meetings, including agendas, note taking and decision documentation and time for socializing.

After the team has met initially, you’ll arrange a meeting between the team and the client. (Please inform the Staff Director that when this happens.) At this meeting, key client contacts will meet the team members, share details about their organization and what they hope to achieve by working with ACT, and respond to Project Consultants’ questions.

PROJECT DEVELOPMENT

Objectives:

1. To gather the information you need to determine whether the project is feasible.

2. To understand the client’s perceived needs and goals.

3. To meet with all key stakeholders to determine who is responsible for ensuring the successful implementation of the ACT team’s recommendations.

4. To work with the client to establish project goals, scope, and timeline.

Key Challenges:

1. To balance the client’s desires against ACT consultants’ interests, skills, and availability.

2. To set realistic expectations for the client and the ACT team.

End Result:

A final work plan agreed to and signed by the client and project leader(s).
**Work plan development**

You will lead development of the team’s work plan. This documents the project’s objectives, the steps the team will take to get there, and the contributions the client must make to ensure success. You will likely find that preparing the work plan is an iterative and consensus-building process in which you will work closely with the client and team members to ensure that all involved are comfortable with how the project will proceed. ACT can help by providing Best Practice guides that describe how to structure projects similar to yours and sample work plans for comparable projects that ACT teams have previously done. Just ask the Staff Director.

**Mid-project management**

Keeping a team of volunteer consultants focused can be a challenge. However, many project leaders say that basic project management techniques lead to success. That means setting clear deadlines (arrived at by working backwards from key milestones like presentations), assigning specific responsibilities and sending reminders. It also entails making sure team members are engaged and that the conditions are in place to sustain their enthusiasm. Managing expectations during the discovery process is important so Project Consultants accept that time is required for the team to define the problem. You may also need to channel some Project Consultants’ urge to jump quickly to solutions.

At the same time, you will need to find ways to maintain the client’s involvement during periods when analysis is taking place and progress seems slow. You will need to be alert to adjusting the project scope if the client’s situation changes, you discover new information or the team is depleted by unexpected resignations.

Scheduling a regular time for team meetings and stating up front the expectation that team members to attend meetings unless they are out of town. Some teams meet weekly; others meet every other week. If the team does not need to meet, it is easier to cancel a meeting than to reset a common meeting time.

At any point, if you would like advice or mentoring from an experienced Project Lead, ask the Staff Director.

**Mid-course review**

You’ll find that a mid-project review is very important. It will be your team’s opportunity to reality-check significant observations and test your tentative conclusions and recommendations. It will be your responsibility to discuss the final draft of the presentation with the client’s ED or primary contact before the formal presentation. This is the best way to anticipate likely reactions of key board members and staff. You’ll want to schedule the date of this meeting far in advance given the challenge of getting key - but busy - people in the room.

After the mid-course review, you will lead debriefing sessions with the client and the team to determine the second phase work that will most help the client. During this time, there can be a bit of let-down in the team’s energy level and it will be up to
you to keep everyone focused on the work needed to successfully conclude the project.

**Final report**
As with the mid-course review, you'll find it helpful to schedule the final presentation as early as possible. You will likely lead by drafting the framework of the slide deck so as to identify data holes and what is most important to accomplish in the remaining months of the project. It will be up to you to monitor your team’s communication style, aiming to make it positive and to match the client’s level of sophistication. You serve as the bridge to the client so the presentation is well understood.

If you like, ACT’s Staff Director can share examples of mid-course and final reports from similar projects in the past.

### 4. WRAP-UP THE PROJECT

**Evaluate the project**
When your project is finished, notify the ACT staff director then ACT will ask you, team members, and the client to complete a survey providing feedback about the experience. ACT is happy to share the results of this survey with you.

**Celebrate your team’s accomplishments**
ACT invites Project Leaders to schedule an event for the team to celebrate your great work. A team dinner courtesy of ACT is a great opportunity to recap the project, share lessons learned, and validate the team’s success in meeting its own expectations and objectives.

**Plan a 12-month follow-up meeting with the client**
Project Leaders’ final responsibility is scheduling a meeting with the ACT team and the client a year after the final presentation. This meeting is an opportunity for you and ACT to learn what worked, what didn’t, and why, as the client moved to implement the ACT team’s recommendations.

Serving as an ACT Project Leader is a powerful way to contribute your professional experience and leadership talent to the community. For more information about serving as an ACT Project Leader or team member, contact Susan Austin, ACT’s Staff Director, at 650/736-1956 or info@stanfordact.org.