CHECKPOINT 1: SOUNDING BOARD

The Sounding Board phase of the ACT project process is critical to the project’s ultimate success. The Sounding Board phase serves as the hand-off of the project from the Project Screener to the Project Leader. This checklist is designed to assist Project Leaders in conducting the necessary due diligence to evaluate the client and the project to ensure that the project is scoped properly and the situation contains the necessary elements for a positive ACT project experience.

As part of the client application process, the ACT Project Screener conducts an initial screening interview, based on the client’s Letter of Interest. This interview is necessarily limited to providing ACT with a high-level view aimed at eliminating those clients that do not meet ACT’s criteria or where clear circumstances exist that would jeopardize the likelihood of a positive project experience.

After receiving the full Project Application, the Project Screener conducts interviews with at least the client’s executive director and board chairperson. These interviews are carried out to determine the feasibility and fit of the project, to define a reasonable scope and objectives for the project and to develop the project posting used to recruit project leaders and team members.

The Project Screener briefs the Project Leader on activities carried out to date and shares impressions of the situation, including any thoughts on major elements of the work plan. The Sounding Board meeting with the client provides an opportunity for the Project Leader to shape the project’s scope and objectives and to gain a detailed understanding of the client and the surrounding circumstances. This phase is not only the time when the Project Leader more precisely defines the project and develops the basics of a work plan, but it also offers the opportunity to uncover new information that may indicate that the timing and/or circumstances may not be appropriate for the engagement of an ACT project team.

If the Project Leader uncovers information that calls the client organization’s viability into question, the project should be carefully scrutinized to determine if there a reasonable likelihood that an ACT team’s efforts can help turn the organization around.

The typical bias of ACT Project Leaders (and the ACT organization itself) is to try to work through obstacles that are presented, taking the position “How can I make this work?” Keeping in mind that ACT’s goal is not only to provide effective assistance to nonprofit organizations, but also to provide a satisfactory project experience to our volunteers, we strongly encourage Project Leaders to ask two questions:

1. Does this client (and the current set of circumstances) meet the ACT project criteria?
2. Do risks exist that could jeopardize a satisfactory project result?

If either of these questions raises doubts or concerns, we encourage Project Leaders to contact the ACT Director at the GSB to discuss the circumstances and consider alternative approaches.

A. Have a Sounding Board meeting with the client and the ACT Project Screener, to understand the client’s current situation and look for issues that might derail the project

- Confirm that the client has a clear mission that guides its activities and the mission is relevant to the organization’s current situation.
• Ask whether responding to the client’s request will significantly advance the client’s mission.
• Consider whether the request addresses the client’s real problem.

• Ask if the client received outside assistance on this issue previously. If so, we encourage you to interview the past consultants.
• Identify the members of the organization who will be directly involved in the ACT project. ACT’s criteria require the involvement of top management and the board, but one or the other may take the lead.
• Determine that the project is a priority of the client’s primary liaison to the ACT team as well as of the organization as a whole. Is there a clear commitment on the part of the client toward active involvement in the project? Ask the client the time commitment in hours per week that the organization is prepared to devote to the project.
• Discuss likely external research and interviews that the ACT team will conduct. Does the client have contacts? To what extent will ACT have to identify contacts?
• Consider the variety of stakeholders, possibly conflicting goals, and need to build consensus.
• Identify any concerns or challenges that the client must address to prepare for a successful consulting engagement.
• Look for indications that the organization’s leader may not be ready to make the decisions required as result of the project.
• Review financial statements. How strong is the organization’s current financial position? Do their projections seem feasible?
• Determine if the organization appears to have the resources (financial and staff) to adequately implement the recommendations that are likely to be made at the end of the project.

At the conclusion of this meeting, the Project Leader should have an outline of the project objectives, deliverables and likely activities in a Project Work Plan.

B. Follow up after the Sounding Board meeting

• Talk with the ED, board chair and key staff members (in person, if possible) to find out if they see the project objectives similarly and to help bring issues to the surface.
• Note any strong personalities among client leadership (board or staff) who may be difficult to deal with.
• Evaluate the roles of the organization’s volunteers, who in some cases may be the most powerful people in the organization.
• Review your observations and concerns with ACT’s Project Screener.

C. Document the project objectives, deliverables and activities in a Project Work Plan

• If you wish, use the Work Plan template and review the Work Plan samples on the Project Leader Central page of the ACT website.
• Refer to Best Practices of ACT Project Leaders, which is also on the Project Leader Central page.
• Search ACT’s past project files for similar projects, by contacting the ACT Director at the GSB.
• If desired, solicit feedback about the potential project scope from an independent experienced ACT project leader (can be arranged by contacting the ACT Director).

D. Work with the ACT Director to select strong project team members from the alumni who volunteered for the project

• Interview volunteer applicants. Consider their motivation for volunteering for this project, relevant expertise, experience working in teams, potential time conflicts and likely commitment to the project.

• A good team size for the average project is 8 or 9 (including one or two project leaders). Assume one or two people will leave the team, cut back on their participation, or won’t deliver. Include enough team members to allow for this.

• Try to have at least one team member who is working for or has recently worked for a major consulting firm.

• Select volunteers with a mix of graduation dates. This provides different perspectives, energy levels and skill sets.

• Consider asking the client to contribute to the team the person who will be responsible for implementing the team’s recommendations.