CHECKPOINT 1: SOUNDBOARD
Note: the checklist for this checkpoint is in a separate document

CHECKPOINT 2: PROJECT KICKOFF WITH FULL TEAM

Clearly establish project logistics
- Decide on logistics (meeting places, tools to use).
- Schedule team meetings for the duration of the project at the outset, preferably every other week, and consider having weekly meetings during periods of more intense activity.
- Err on the side of having too many team meetings rather than too few.
- Allocate enough time during the project kickoff meeting to schedule team meetings with the client and key milestone deadlines well in advance.

Manage team meetings well
- Provide an agenda and stick to it.
- Allocate a portion of the meeting to socialization. Get to know one another.
- Rotate the responsibility to take notes at each meeting.
- Document decisions and results.

Use email effectively
- Email etiquette. Stress the importance of the team members carefully reading and promptly replying to email messages.
- Agree on a set of key words in message subject lines, such as always starting with “ACT {project}” and including “Action Required” or other indications of importance when appropriate.

Orient the project team and learn about them
- If you have co-leader, learn his/her leadership style, e.g., participant or administrator; directive or collaborative.
- Ask members why they decided to be an ACT volunteer, what their goals are for this project, skills, interests, willing to be a sub-team leader, time commitment, concerns.
- Tell volunteers that they should take responsibility to recognize when they feel out-of-the-loop and talk with the team leader about it.

Organize the project around the availability, interests and skills of the team members
- Present a draft work plan to the team, and then ask for the team’s input and concurrence. The team will almost always improve the work plan, and they will have an opportunity to buy into it.
- Make sure that the work plan and deliverables are appropriate to 10 hours per month per person on the margin and the predispositions of your team members. Better to under-promise and over-perform.
• Identify important or time-consuming activities and start them early in the project.
• Play to the strengths of your team members. Try to build the work plan around what people want to do and are good at.
• Define the project to reflect the interests of the team. Keep doing this as the project progresses. Ask the group whether they want to get it done and if so, who will do what. Keep listening to what people like.
• Try to structure 2-3 sub teams to execute the data collection and analyses. Assign 2 or 3 team members to each sub team.
• Hypothesis-driven projects work sometimes but not always. If no one on the team has deep experience with the client’s issue, don’t force the hypothesis approach.
• Find out, upfront, if there is anyone on the team with skills at creating presentation slides, and ask him/her to take the lead on the team’s presentations to the client.

CHECKPOINT 3: MID-PROJECT MANAGEMENT

Manage the project team
• Have clear deadlines for all tasks. Work backwards from key milestones, like the mid-term presentation and final presentation.
• Assign specific responsibilities and due dates to team members, and send reminders about deadlines before each team meeting.
• Ask team members to volunteer to pick up responsibility for team members who expect to be tied up during certain periods.
• Manage team members who seem to disagree with the project objectives or work plan. Sometimes their points of view can strengthen the project. However, when their points of view have been thoroughly considered, they must accept the team’s consensus or you should ask them to leave the project.

Keep all volunteers engaged
• Be certain that all team members perceive that there is enough challenging work so everyone knows they are needed.
• Avoid volunteers feeling out of the loop by providing frequent email up-dates and occasional phone calls.
• Re-engage volunteers who drift away from active participation during the project. Call them (don’t use email) as soon as you notice this and try to find out why.
• You might assign wavering team members to sub-teams addressing topics that interest them, and try to pair them with energetic people.
• Mix team assignments, change who works with whom.
• Make the project tangible by arranging a field trip so team members see the client’s work.
• Provide snacks at each meeting and ask the client if they are willing to pay for them.

Manage the initial discovery process
Discovery can feel aimless and unstructured. Reassure the team that it’s normal and worthwhile, and that a clearer path to problem definition and recommendations will emerge from the process.

- Volunteers might be eager to jump out with suggested solutions; allow that process to happen, then table the proffered solutions and proceed to discovery.
- Sometimes just observing without jumping straight to problem solving helps real issues come to light.

Maintain the involvement of client staff members
- Get broad staff involvement from the beginning with workshops or similar opportunities for people to get a sense of what is going on and to have an opportunity for input.
- Design and present the project so that the staff believes it can help them with their jobs and is more than an unwelcome imposition on their already thin resources.
- Consider forming a working committee of the key opinion leaders in the client’s organization.
- Clearly state and monitor the completion of project work we ask the client to do.
- As the process plays out, provide updates to the staff via email, staff meetings, etc.
- Ask the Executive Director and/or key staff to be present at important meetings.

Collaborate with the client to make work plan changes if needed
- Expect changes and ongoing adjustments if the client’s situation changes during the project or you discover new information.
- If you need to revise the work plan, get approval from the client. Use the work plan as a tool for communication so they know what they’re going to get in the end.
- Control “scope creep.” If you need advice or help, contact ACT’s project liaison.
- If you are ever faced with really significant depletion of the team, be up front with the client and consider reducing project scope.

Prepare for the mid-project review
- Mid-project reviews/presentations are very important – use them to present key observations based on your discovery, tentative conclusions and recommendations to see if you are on track.
- Discuss the final draft of the presentation with the client’s ED or your primary client contact before the formal presentation is given. Ask about the likely reactions of key board members and staff members.

CHECKPOINT 4: THE FINAL PRESENTATION

Start preparations early
- Draft the framework for the final presentation as early as you can in the project, so it gives the team a target to work towards.
- Creating a draft of the final PowerPoint presentation slides provides a structure for thinking about where your data holes are and what is really important to accomplish in the remaining months of the project.
• If the Board is the client, the final presentation will likely need to occur when a board meeting is scheduled, so the project timeline should be created with that in mind.

Use an effective presentation style
• Think about the communication style that you use. Is it appropriate for the client’s level of sophistication?
• Starting with positive points and then talking about what can be improved makes the client more receptive to your message.
• Make sure what you’re saying has a basis, even if that basis is prior experience, and be careful of jumping to conclusions.
• Prioritize recommendations; be wary of overwhelming client with too much info in the final presentation.
• Final presentations are more effective if they present findings and conclusions first and supporting data in appendices at the end.

Involve the client in the presentation
• Get client feedback on what they care about and focus the presentation on it.
• Test preliminary ideas with client leaders during the project - before formal presentations.
• During the course of the project listen to all stakeholders who will attend the final presentation.
• Clients respond well to observations that are backed up by their own data.
• Keep the door open for input right through to the end and, when appropriate, incorporate staff input with attribution, e.g., attach a copy of an email as an addendum to the project report.
• Have the client involved in the writing of the recommendations, and consider having client people present part of the presentation
• If the project team has a major disagreement about the final recommendations, consider talking to the client about it to see if they want to hear both viewpoints.
• Discuss the final draft of the presentation with the client’s ED or your primary client contact before the formal presentation is given. Ask about the likely reactions of key board members and staff members.

Focus on implementation of the recommendations
• Keep recommendations clear and simple, considering the organization’s capacity to implement them.
• Provide a framework for implementation and measurement of the results of the team’s recommendations.
• Identify 3 or 4 specific things the client can accomplish in the next 2 months (short-term)...what they can start doing right now. Put this “next steps” slide at the very end with a timeframe.

CHECKPOINT 5: POST-PROJECT WRAP UP

Complete final project administration tasks
• Forward project info (project work plan, midterm & final presentation) and other useful (reusable) products, e.g. frameworks, lessons learned or content (URLs etc.) to the ACT office for future team reference.
• Give the ACT Director comments about team members’ performance – positive and/or critical – to aid in future team matching.
remind team members of the importance of responding to the end-of-project survey.

**Celebrate and thank the project team**

- Pat yourselves on the back! Feel good about the help you provided. ACT will reimburse the cost of a dinner/celebration.
- Take time to personally thank, or send a note of thanks to, each team member. Encourage them to volunteer again.
- Identify team members who are candidates for project leadership, and talk to them to encourage them to step up.

**Wrap-up the project with the client**

- Solicit feedback from the client after the final presentation.
- Encourage the client to show appreciation to the team in some small way (pens, memo pads or t-shirts with client’s name).
- Remind the client of the importance of responding to the end-of-project survey.
- Contact the client after 6–12 months to see how things are going and schedule a one-year follow-up review meeting and survey.
- Follow the one year evaluation process managed by ACT’s Head of Evaluation who will contact you eleven months after the conclusion of the project to initiate the one year evaluation process.
- At the one-year follow-up review meeting, ask the client to present to the team what they have done with the recommendations. It is gratifying for the team if things have gone well; instructive for ACT if they have not.