Project Leader Round Table 5

October 15, 2011

Topics

- Uncovering a client’s real issues early in the project
- Working with team members, co-leaders and/or clients whose style and expectations are different than yours
- Writing a project work plan & getting buy-in from the client and team members
- Administrative tips for project leaders
- Questions for project leaders

Introduction

This was the first project leader round table of the Fall 2011 project round, and it took place during the ACT Fall Kick-off Event. Tony Ramsden led the round table, and he suggested several topics for discussion, based on topics that were of interest in last year’s fall round table. The participants suggested additional topics (scope creep, sustaining team member interest) and then voted on the topics to discuss. Uncovering a client’s real issues received the most votes (6), so the discussion began with this topic. After the group discussion, participants answered some questions about future round tables and help that the ACT Management Board could provide for project leaders.

Topic 1: Uncovering a client’s real issues early in the project

A project starts several months after the client submitted the ACT application, and the situation may have changed since that time (and it may continue to evolve). Participants suggested some approaches that they found helpful:

- Try to find out why the client came to ACT and who drove the decision. Note there are times that the client’s leader doesn’t understand the real issues.
- The issues might not be as important as understanding who is the real decision maker. Is it the board, ED, other part of organization? If not board or ED, the ACT project could be in trouble.
- It is important to start by understanding the entire organization. You need to understand underlying problems and tensions. Try interviewing a broad group of people at the client, just letting them talk. People like to tell their stories and be heard. This usually works best during the “honeymoon” period at the start of the project. Take copious notes, and read your notes again later in the project.
• Ask hard questions at initial meetings with the client, see how they respond, see where they hesitate. Conduct in-depth interviews with the decision maker.
• Who are the best informants? Might not be who you think. The key contact might not be candid or in touch. Secretaries and clerks might provide useful information.
• Go outside organization; see what contemporaries think of them.
• If the ED & board support each other they can drive change and get buy-in from other parts of the organization.
• If the project scope and/or direction changes, be upfront and frank with the client.

**Topic 2: Working with team members, co-leaders and/or clients whose style and expectations are different than yours**

Project leaders may have to deal with clients, co-leaders, and team member with different personalities and styles. Working with volunteers is different than working with colleagues. Team members can drop out or lose interest. Participants had the following suggestions:

• Know your team, their skills, interests, work schedules, early on.
• Clarify expectations with team members, e.g. if you need to miss a meeting, do this, etc. Emphasize that there are commitments and expectations.
• Some people feel they already know the answer to the client’s problem at the first meeting. It helps to listen to them then suggest that they put their answer on hold while the team gathers information.
• Team members often include data crunchers and non-data crunchers. You need to satisfy those who want to crunch data.
• If team members’ styles are different, see what interests and motivates them, and try to find a way they can contribute.
• Sub-teams help, where team members can self-select based on their interests.
• If you have people who want to go in a different direction from the team consensus, acknowledge them, then see if you can incorporate their ideas later on.
• Contact Susan Austin if you have a problematic team member. She may be able to help you.

**Topic 3: Writing a project work plan & getting buy-in from the client and team members**

• Clients often think they know where they want to go. We can help them consider side issues (e.g., competitive assessment, how have others done it), help them choose the best target. We can offer a business perspective. Non-profits tend not to see themselves as competing with others for resources.
• If you sense there are people at the client who are silently resistant to the work plan, be gentle but direct and talk to them in private.
• Deciding who does what part of the work plan can be tougher than getting the team’s general buy-in. Does your team have the right skills? Most project leaders accept all team members who volunteer for their project. If you don’t get the right skill mix, talk to Susan Austin to see if she can help you find additional volunteers.
• Make sure the work plan reflects the team’s interests. Acknowledge that it may change once you learn more about the client’s situation.

**Administrative tips for project leaders (very brief discussion because of limited time)**

• Scheduling meetings can be a significant administrative hassle. Web-based tools such as Doodle.com for scheduling can be very useful.
• Managing the administrative end of being a project leader is an important part of the job.
• The Wiki helps with document sharing.
• Maybe there should be a project leader roundtable focused just on project administration.

**Questions for project leaders**

• Tony asked about the attendees’ interest in additional project leader round tables in December, February and April. Less than half the people might attend another project leader round table.
• Timing for future round tables: weekday evening was a more popular choice than Saturday morning.
• Location for future round tables: several people were interested in an East Bay or SF location.
• Interested in a book discussion or article discussion? Not very interested; most people wanted the discussion to stay focused on projects.

• Tony asked how many people would be interested in having a project advisor, someone on call who could work with them from the beginning, review the work plan and be available for discussions. Only one person was interested. Most people preferred having a co-leader.

• Tony asked what the ACT Management Board could do to help project leaders. Suggestions included:
  o Instead of providing general project leadership guidelines, it might be more helpful to provide notes about specific projects, outlining what went well, what didn’t, and how the leaders dealt with the issues.
  o Provide a comprehensive best practices document that summarizes project leaders’ thoughts from all round tables and other sources.
  o Identify faculty members doing research of interest to project leaders. They might be at other places than GSB. (Tony commented that currently there is no faculty liaison to ACT, and GSB faculty members have not been interested in getting involved with ACT. They prefer to focus on their own research areas.)
  o Provide background information on various segments of the non-profit world, similar to guides to various industries in the for-profit world.
  o Provide additional follow-up with clients after projects are complete. The current one-year follow-up process is not effective enough. Many project leaders do have a one-year follow-up meeting with their clients, but some don’t. Susan Austin can prompt project leaders, but she doesn’t have time to do the follow-up herself. Maybe the management board can focus on this issue and consider if board members should do the follow-up.
- Provide an aid for finding volunteers for a well-balanced team: a website with a directory of active ACT volunteers with brief descriptions of their skills and interests. Make it easy for project leaders to use the website and reach out to volunteers. Facebook page?
- Reinstate the fACT program (current GSB students volunteering to work on ACT projects).