Stanford ACT
Project Leader Roundtable at Project Kickoff Meeting
October 16, 2010

Attending: 16 project leaders

Began by listing 4 key topics of concern to PLs, gleaned from BLACT report. 8 volunteers had managed 5 or fewer projects and were asked to vote on the topics that interested them most. Topics and votes:

- Managing clients, teams, and co-leads whose style or expectations are different than your own (2)
- Delivering actionable product (0)
- Dealing with volunteers who fade away or can’t keep to a timeline (1)
- Uncovering real client issues (5)

Group went forward with discussing **uncovering real client issues**. Highlights of discussion (with specific recommendations marked in yellow):

- Many clients really want help with fundraising or tactical help, rather than strategy
- Could be a screening issue-- client needs to be pinned down to exact issues
- Client leadership doesn’t always really want to change, feels threatened by recommendations
- Three spots where you need to be aware of finding the real issue
  - Screening
  - Sounding board
  - Mid-point, after deeper research
- Sometimes mid-project you find there are stakeholders below the leadership level who aren’t bought into the project
  - During process ask who the stakeholders are
  - Make sure to meet with the board chair along with the ED
  - Have the client fill out the Organizational Capacity Assessment Tool (OCAT) (note: Carl said this should be but is not yet available at PL Central)

Jon asked group to focus on the three areas where issues emerge, explain them, and make suggestions:

- **Screening**: Screeners try to educate the clients at this stage about ACT’s capacity and that even though the project is *pro bono* it can take a big time commitment
  - Sometimes articulating the issue fixes it
  - Sometimes leadership can’t articulate the issue-- which means the project is unlikely to be successful
  - Sometimes what they want isn’t what ACT does
  - Screeners need to be disciplined about sticking to guidelines about what ACT does and about saying no to wrong projects
    - PLs should also feel like they can shut a project down if issues emerge that cast the project in a different light-- at any time
If ACT isn’t the solution clients should be offered other resources, such as Taproot. ACT’s website describes and has links to alternative resources.

**Sounding Board**: Project leader validates project scope with client
- You might uncover issues that aren’t part of the scope of the project
  - ACT vols often want to help with other things, but it’s okay (best) to keep project focused (or to shut project down if issues interfere with execution)
- Meeting in person with both ED and board chair can help bring issues to surface
  - Ask probing questions
  - Dig into ED tenure, relationship with board
- Sometimes it’s okay to just do a small project if that’s what the client wants-- resist urge to make project bigger than what they want
- Going through the process of preparing the workplan can also identify particular issues
- Setting proper client expectations is an important part of Sounding Board.
- Sometimes just observing without jumping straight to problem solving helps real issues come to light
  - Volunteers might be eager to jump out with suggested solutions; allow that process happen, then table the proffered solutions and proceed to discovery
  - Discovery can feel aimless and unstructured-- reassure the team that it’s normal and worthwhile, and that a clearer path to recommendations will emerge from the process.

**Working with the full team**: Often when the team is gathering data it brings to light new issues-- or the real issue
- An integrated team, i.e., one where client meets regularly with team and helps them in work, is best for digging deep on issues and promoting client ownership of the recommendations,
  - Although if the ED is the problem-- this doesn’t work!
  - The type of project dictates how much to involve the client-- strategic or managerial type projects you might want them more integrated, financial modeling maybe less
- Whichever way you work, make sure the client is in sync and involved with project and has buy-in.
- Mid-project check-in very important-- present key observations, tentative conclusions and recommendations to see if you are on track.

**Question for group: do people use a formal hypothesis-driven approach?**
- Not that many people do this; Jon observed that it’s because PLs aren’t necessarily subject experts at start of project so hypothesis is difficult to come in with

Group spent a few minutes on another topic: *keeping team motivated and harmonious:*
- ACT teams can have a lot of people with experience and opinions-- just let them be and see what comes out of it
- Assume 10-15% of people won’t deliver and create some redundancy
- Make your projects fun
- Keep the momentum
Incomplete List of Participants
Jon Richards, facilitator
Beth Morgan, LST team member and co-facilitator
Karl Matzke, Co-PL, American Farmland Trust
Jim Dern, Co-PL, American Farmland Trust
Claudia Schweikert, American Farmland Trust
Ashok Khanna, Co-PL, Audubon Canyon Trust
Steve Bowling, Co-PL, Mandarin Institute
Ed Best, Co-PL, City of Walnut Creek Civic Arts Education
Ernie Leopold, Co-PL, City of Walnut Creek Civic Arts Education
Vince Forte, PL, Diabetic Youth Foundation
Tim Kelly, PL, Chartwell School
Charles Cagnon
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