



ACT
STANFORD ALUMNI
CONSULTING TEAM

volunteer handbook



CENTER FOR
SOCIAL INNOVATION

STANFORD GRADUATE SCHOOL OF BUSINESS

We change the world one project at a time!

stanford alumni consulting team

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www.stanfordact.org

Introduction

Thank you for your commitment to serve as a volunteer with ACT, the Alumni Consulting Team. We look forward to working with you to ensure a successful ACT project experience.

More than 950 Stanford Graduate School of Business alumni have worked with ACT since its founding in 1987 to provide pro bono consulting services to over 350 clients, supporting the arts, education, the environment, and social services. Estimated to be one of the largest pro bono resource providers in the Bay Area, ACT donates approximately \$2 million worth of consulting services annually.

In pursuing our mission, we aim to provide GSB alumni the opportunity to serve their community in a meaningful and enjoyable manner. As representatives of the GSB as a whole, we strive for quality, integrity, and excellence while working in an environment that values collaboration, respect, and personal growth.

The ACT Model

Nonprofit organizations come to ACT to receive pro bono consulting services from a team of MBA alumni. The ACT staff initially screens potential clients to ensure that there is a match between the services offered by ACT and the immediate needs of the client. Twice a year, following each application deadline (currently January 30 and June 30), the ACT staff circulates brief project descriptions to potential ACT Project Leaders. Once a Project Leader selects a project, he/she works with ACT staff to identify an “Associate Project Leader” or “Co-Project Leader” to help define the scope of the project and lead the team.

The ACT Consulting Process

Project Leaders guide projects through three major phases over a six- to nine-month period:

Phase I: Sounding Board

Phase II: Project Execution

Phase III: Project Completion and Wrap-Up



*I don't know if I'm the benefactor
or the beneficiary of this
program.*



Al Davis, MBA '62
ACT Project Leader

phase I

Phase I: Sounding Board

During the Sounding Board phase, Project Leaders:

- Review the application materials and other background information on the client
- Hold initial client meetings to determine the primary issue facing the organization and the scope of the project to address this issue
- Provide the ACT staff with an up-to-date project description used to recruit volunteers for the project team

There is generally little or no independent research and analysis done during this phase of the project. Rather, the focus is on client discussions to clearly define the issues and parameters of the project prior to recruiting a full team of volunteer consultants.

The desired outcome of this phase is to develop a detailed work plan, mutually agreed upon by the client and the Project Leaders, which will guide the team during the execution phase.

TIP Find specific information on a variety of project areas from our Ask ACT Experts, seasoned volunteers and professionals with expertise in strategic planning, market analysis, finance, marketing, organizational development, and executive coaching.

Structuring a Sounding Board Meeting

As part of the client application process, the ACT staff conducts an initial screening interview by phone. This interview is limited to providing ACT with a high-level view aimed at eliminating those clients that do not meet ACT's criteria, in order to minimize circumstances that would jeopardize a positive project experience.

Pre-Project Phase

- Initial client screening
- Client submits application to ACT (1/30 and 6/30 deadlines)
- ACT circulates project briefs to Project Leaders
- Project Leaders select project to lead
- Project Leaders paired and connected with client

Typical duration = 1 month

Phase I Sounding Board

- Project Leaders review application and other materials
- Project Leaders work with client to determine scope of project
- Project Leaders provide ACT with project description for team member recruitment
- Project Leaders develop draft work plan to present to team and client, and send copy to ACT office
- Client approves detailed work plan

Typical duration = 2 months

the act project process

The sounding board process presents the first true opportunity in the ACT – client relationship to gain a detailed and intimate understanding of the client and the surrounding circumstances. This phase offers a time for Project Leaders to more precisely define the project and develop the basics of a work plan. It may also uncover new information indicating that the timing and/or circumstances may not be appropriate for the engagement of an ACT project team.

Among the factors to consider and explore during the initial client meetings and while developing a detailed work plan are:

- Does the organization have a clear mission that guides its activities?
- Is the mission relevant to the organization's current situation?
- How strong is the organization's current financial position? Do their projections seem feasible? Review financial statements if needed.
- Which members of the organization are directly involved in the ACT project? ACT's criteria require the involvement of top management and the board of directors.
- Is the project a priority of the client's primary ACT liaison, 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?

Phase II Project Execution

- Project opportunities publicized to all Bay Area alumni
- Volunteers sign up for projects of interest on ACT website
- Project Leaders and ACT staff determine size and structure of team
- Project Leaders contact each team member to review project work plan and commitment
- Project Leaders and team members attend ACT training session and hold initial team meeting
- Full team holds kick-off meeting with client, and schedules regular milestones
- Project Leaders provide ongoing leadership, feedback, and support to team
- Team presents findings and recommendations to client

Typical duration = 4 – 6 months

Phase III Project Completion and Wrap-Up

- Project Leaders schedule 12-month follow-up meeting with client
- Project Leaders request client send a letter to the Dean
- Project Leaders send copy of final report to ACT office
- Project Leaders encourage team and client to complete ACT's follow-up surveys

Typical duration = 1 – 2 weeks



I brought ACT a project that was daunting to my staff, and finding the right answer was critical to our growth path. My ACT Project Leader not only helped me find my way, but also he made it fun to go through the process. Thank you, ACT!



Kristen Mickey, Executive Director
FACES (Foundation for Autistic Childhood Education and Support)

- Has the client received outside assistance on this issue previously? If so, we encourage Project Leaders to interview past consultants as part of the due diligence process.
- If Project Leaders uncover information that calls the client organization's viability into question, it should be carefully scrutinized to determine if the ACT team's efforts can help turn the organization around.

TIP *Review this handbook with the client during one of your first meetings.*

The typical bias of ACT Project Leaders 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 instead ask the 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 any of the questions outlined above raise doubts or concerns, we encourage Project Leaders to contact ACT staff to discuss the circumstances and alternative approaches.

phase II

Phase II: Project Execution

Phase II begins with recruitment of a full team of volunteer consultants. Project Leaders work with ACT staff to determine the appropriate size and structure of the team based upon the response generated from recruitment efforts. When building a team, ACT staff and Project Leaders seek a balance of volunteer skills, work experience, and new and experienced volunteers.

TIP *Project Leaders differ in their approach to leading projects. Some choose to restrict their role to organization of project logistics, oversight, and review and editing of work product without also participating in a project sub-group. This keeps the time commitment to a more manageable level. Other leaders choose to manage project logistics as well as participate as a full team member, which results in a greater time commitment, perhaps twice that of the typical team member. Early communication about the role of your team's Project Leaders will help manage expectations and the time commitment for both the team and the Project Leaders.*

Team Structure: Suggestions for Structuring Your Team

- Create sub-groups based on location, expertise, or interest
- Assign tasks/projects to two individuals at a time in case a volunteer needs to withdraw or reduce participation

Working with Your Team

Periodically, volunteers are unable to follow through on their anticipated contributions to the team for a variety of reasons – changes in circumstances in their personal or professional lives, the project does not meet their expectations in terms of content or work load, etc. In order to avoid this situation, we strongly encourage Project Leaders to contact each team member individually prior to the start of the full project to:

- Discuss the scope of the project in terms of time, type of work expected, etc.
- Discuss the importance of each team member's contribution to the overall success of the project
- Discuss the importance of the team's contribution to the client and the implications for the reputations of ACT, specifically, and the Graduate School of Business and Stanford University in general
- Ensure commitment on the part of the volunteer to see the project through to completion
- Try to identify key issues in advance; e.g., city vs. peninsula dwellers, weekday vs. weekend meetings

At the kick-off meeting, Project Leaders brief the volunteers on the project, introduce the work plan they have created, and review the scope of the project and the necessary contributions from each volunteer.

TIP *Allocate enough time during the kick-off meeting to schedule future meetings and key milestones well in advance.*

Once the project is under way, Project Leaders provide ongoing leadership, feedback, and support to volunteers, schedule client meetings as needed, and monitor the progress of the project against the work plan. Additionally, any team member can contact ACT staff for additional support or questions that arise throughout the course of the project. Generally, this phase of the project lasts four to six months and includes the following elements:

Research and Analysis: This may include data collection, survey development, financial data review, etc.

Mid-course Review: Once the bulk of the research and analysis has been completed, the team meets with the client's staff and board representatives to assess the direction and progress of the project. At this time, if the project has changed in scope or direction,

it is helpful to revise the work plan with the client so that both the client and the team are in agreement on expected project deliverables.

Preparation of Final Report: The team completes the initial draft of its report (with findings, conclusions, and recommendations), then reviews it with the primary client contact for refinement and comment.

Presentation of the Final Report: The team presents its conclusions and recommendations to client management and board of directors.

TIP Visit the *Volunteer Resources* page on the ACT website (www.stanfordact.org) for common frameworks, templates, and presentations to use during your project.

“

ACT far exceeded our expectations. The team's insights and management skills were exceptional, and they went above and beyond in meeting our needs. For a resource-constrained nonprofit, the ACT group was a godsend!

”

Deborah Nelson
Co-Executive Director
Social Venture Network

phase III

Phase III: Project Completion and Wrap-Up

Phase III is the completion and wrap-up phase of the project, and includes project evaluation led by ACT staff. At the final presentation, Project Leaders should schedule a 12-month follow-up meeting to assess the impact of the recommendations and assist in any implementation issues the client may be confronting at that time.

ACTION Once the team has completed its project, please submit a copy of the final report and any other relevant documents to the ACT office (preferably in electronic form).

ACTION Please request that the client send a letter to the Dean of the GSB describing the impact and experience of working with an ACT team, with a copy to the ACT Executive Director. These letters can be addressed as follows:

Robert Joss
Dean
Stanford Graduate School of Business
518 Memorial Way
Stanford, CA 94305-5015

Executive Director, ACT
Stanford Graduate School of Business
518 Memorial Way
Stanford, CA 94305-5015

Following project completion, ACT distributes a brief electronic survey to all clients and volunteers to monitor the effectiveness of the program. In addition, members of ACT's Evaluation Committee or Project Leaders conduct follow-up surveys one year after project completion. Please encourage your team members and client contacts to assist in ACT's evaluation efforts, as it helps ACT to continually improve its offerings.

Checklist for ACT Project Leaders

- Review application/background materials from client
- Meet with client to define project scope
- Update project description, send to ACT staff
- Work with ACT staff to determine project team
- Attend ACT training and hold initial team meeting
- Send draft work plan to ACT staff
- Hold team kick-off meeting with client
- Lead and support project process/execution
- Hold mid-course review with client, and revise work plan if necessary
- Present final report to client and send to ACT staff
- Schedule a 12-month follow up with client
- Request that client send a letter to Dean Joss
- Encourage team and client to complete electronic surveys

ACT Staff

Feel free to contact the ACT staff at any time. We are available to assist you in locating examples of past project reports that might be beneficial to your current efforts, identifying specialist volunteers to assist your team, and discussing the unfolding of your project.

Executive Director
Phone: 650.725.3028
Fax: 650.723.0516

Program Manager
Phone: 650.736.1956
Fax: 650.723.0516

info@stanfordact.org

Jackson Library Staff

A reference librarian from GSB Jackson Library is available for consultation to assist ACT teams in developing, defining, and identifying resources to meet their research needs. These consultations can be done in person, over the phone, or via email.

To set up a consultation, please contact Jackson Library Director Kathy Long (650.725.2002 or long_kathy@gsb.stanford.edu).

ACT's website at www.stanfordact.org

NEW! Ask ACT

<https://alumni.gsb.stanford.edu/act/resources/askact/index.html>

Alumni consultants or clients can find specific information on a variety of project areas from our Ask ACT experts. These seasoned volunteers and professionals have expertise in strategic planning, market analysis, finance, marketing, organizational development, executive coaching, and much more.

NEW! ACT Online Database

<https://alumni.gsb.stanford.edu/act/resources/volresources.html>

Access historical project data and information via an online database. Gain valuable insight from past projects or volunteers before you embark on your own project.

Document Templates and Sample Reports

<https://alumni.gsb.stanford.edu/act/resources/doctemplates.html>

A variety of templates and sample reports are available to guide teams in developing project work plans, work breakdowns, mid-term reports, and final reports.

Tools for Teams

<https://alumni.gsb.stanford.edu/act/resources/toolsforteam.html>

Find helpful tools and resources for ACT project teams, including online survey and meeting scheduling tools and articles on nonprofit topics.

Trainings, Workshops, and Events

<https://alumni.gsb.stanford.edu/act/about/calendar.html>

Check the listings of upcoming trainings, workshops, and events sponsored by ACT to further the impact of our work in the community.

Video and Transcript Archive

<https://alumni.gsb.stanford.edu/act/resources/videolibrary.html>

Browse through the video archive of past trainings, workshops, and events covering such topics as the ACT Consulting Process, Nonprofit Consulting Skills, Nonprofit Board Governance, and more.

ACT is part of the Stanford Graduate School of Business Alumni Association and the School's Center for Social Innovation.

The Center for Social Innovation

ACT, the Alumni Consulting Team, is the primary alumni-focused program of the Center for Social Innovation at the Stanford Graduate School of Business. The mission of the Center for Social Innovation is to build and strengthen the capacity of individuals and organizations to develop innovative solutions to social problems for a more just, healthy, and sustainable world. In its approach to social problem solving, the Center aspires to dissolve boundaries and ensure the mutual exchange of ideas and values across sectors and disciplines, and through bridging theory and practice.

The Center's other offerings include:

- *Stanford Social Innovation Review*: a quarterly magazine for nonprofits, foundations, and socially responsible businesses
- Executive Education: leadership programs that strengthen the capacity of community leaders to impact social change
- Stanford Project on the Evolution of Nonprofits: a comprehensive research study of the Bay Area nonprofit sector



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For More Information

Alumni Consulting Team – Center for Social Innovation

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