ACT Full Team Project Team Member Checklist

CHECKPOINT 1: SOUNDING BOARD AND WORK PLAN DEVELOPMENT
- Collaborate with your project leader in defining the goals for your project and drafting the Project Workplan that documents your objectives, activities, deliverables and schedule.
  Note: The checklist for this checkpoint is in a separate document

CHECKPOINT 2: PROJECT KICKOFF WITH FULL TEAM

Clearly establish project logistics
- Help your project leader decide on logistics (meeting places, tools to use).

- Your leader will probably schedule team meetings for the duration of the project at the outset, preferably every other week.

- Be aware that there may be a need for weekly meetings during periods of more intense activity.

- Plan to attend all team meetings, and give your project leader early warning if any travel plans will keep you away from some meetings.

Participate actively in team meetings
- Help keep the meetings moving so all agenda items can be covered.

- Be willing to be part of a rotating responsibility for taking notes at each meeting.

- Review the meeting notes to help ensure that all decisions and results were documented.

Use email effectively
- Email etiquette. Remember the importance of 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.

Learn about each other
- Tell other team members why you decided to be an ACT volunteer, what your goals are for this project, what your skills and interests are, and if you have any constraints or concerns.

Consider your availability, interests and skills
- Make sure that you are comfortable working on the project for about 10 hours per month (2-3 hours per week on average) with some likely peaks and valleys.

- Play to your strengths as a team member. Take on tasks that you want to do and are good at.

- As the project progresses, keep the project leader aware of what you like or don't like.

- Your project leader may set up sub teams to execute the data collection and analyses. Volunteer to lead a 2 or 3 member sub team if you can.

- Tell your project leader, upfront, if you have skills at creating presentation slides.

CHECKPOINT 3: MID-PROJECT MANAGEMENT

Manage your participation in the project
- Work with your project leader to set clear deadlines for all tasks.   Work backwards from key milestones, like the mid-term presentation and final presentation.

- Accept specific responsibilities and due dates for your tasks, and let your project leader know if sometime you have to miss a deadline.

- If you have the time, volunteer to pick up responsibility for team members who expect to be tied up during certain periods.

- If you find that you have a serious disagreement with the project objectives or work plan, and most other team members don't agree with your point of view, discuss the situation privately with your project leader or the ACT Staff Director.

Stay engaged with the project
- Take responsibility to recognize when you feel out-of-the-loop, and talk with the project leader about it.

- Let your project leader know if you prefer to mix up your sub team assignments, working with different people at different times.

- Take advantage of any opportunities to see the client's operations, such as a field trip to the client's site.

Participate in the initial discovery process
- Discovery can feel aimless and unstructured.   Understand that it's normal and worthwhile, and that a clearer path to problem definition and recommendations will emerge from the process.

- You might be eager to jump out with suggested solutions; but it is often best to table your ideas for solutions until later, and proceed to discovery first.

- Be aware that sometimes just observing without jumping straight to problem solving helps real issues come to light.

Help your project leader make work plan changes if needed
- Expect changes and ongoing adjustments as the client's situation changes during the project.

- If the project leader needs to revise the work plan, he or she will get approval from the client.   The work plan serves as a tool for communication so the client knows what they're going to get in the end.

- Help your project leader control "scope creep."

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.

CHECKPOINT 4: THE FINAL PRESENTATION

Start preparations early
- Your project leader will probably work with you to draft the framework for the final presentation as early as possible 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.

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.

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
- It is very important that you respond to the end-of-project survey. ACT needs to know what you think!

- If you would like to be a candidate for project leadership, talk to your project leader about your interest.

Celebrate with your project team
- Pat yourselves on the back! Feel good about the help you provided. ACT will reimburse the cost of a dinner/celebration.

Wrap-up the project with the client
- Your project leader will contact the client after 6 –12 months to see how things are going and schedule a one-year follow-up review meeting and survey.

- You will be invited to the one-year follow-up review meeting, where the client will present to the team what they have done with the team's recommendations.