ESC-US Conference Call - Quality Assurance
August 3, 2017

Facilitator: Trudy Smith **Recorder: Paul Moore**

Amber Cote, Doyle Eiler, Craig Kowalski, Darlyne Koretos, Julie Crockford, Ulea Lago, David Factor, Vicky Foxworth, Susan Loucks, Kathy Leone, (don't know)Paylor or Kayla? Olsen, Bill Schroth, Michael Towers

Trudy: We are all concerned with our reputation. They work to recruit to their core values and clearly communicate performance expectations. She relies on her Director of Consulting to assure high-quality volunteer consultants in order to fulfill that expectation. Most of us do client evaluations; they also ask their consultants to evaluate the jobs on which they serve, and also to inform them of any team member issues. If a team member issue is identified, she follows up directly with the client and will offer special pricing if expectations are not met. Their evaluations target "A" performance.

Ulea: Relationships with their 150 consultants are very important. She wants them all to feel comfortable to reach out to her for any needs they may have. They have started doing an early project client survey, immediately after the first survey. Formerly this was at 30 days and every 60 days thereafter until completion. The survey is pointed toward identifying issues that could cause the project to run off the rails. They ask teams to provide an interim report, and she shares it with a team of consultants who conduct a peer review call. Ulea will share the survey and the peer review script, and Darlyne will put it on the website.

Vickie (Vicky): Seconds Ulea's statement of needing to know the consultants very well. She looks for soft information as well, such as their energy level, etc. Knowing them individually helps to match them to the client. She brings a project team together for a meeting prior to them meeting with the client. They have a "match meeting" for the team and client in her presence, and emphasizes the expectations each can have of the other. (She will supply this document.) At 35% and 75% of completion they do a checkup to gather successes, challenges, etc.

David: If there are issues, Vickie (Vicky), how to you address them?

Vickie(Vicky): She directly calls the consultants and the clients to understand and address what is going on. If a change in consultant or an engagement extension is needed, she will provide it. She does a lot of coaching over the phone, with clients as well as consultants.

David: Has noticed a periodic issue with clients not knowing how to utilize consultants, both in coaching and project situations. They have to help the clients understand how to assert themselves, make their needs clear, etc. They have about 110 consultants.

Craig: Matching the right people to the project is critical. They try to get the project manager to the first (intake) meeting with the client but that does not always happen. They spend a lot of time in the first meeting helping the client understand how this works. The issue of "how to use us" comes up more frequently in coaching. They are inclined to make a switch rather than trying to make a fix. Important that client knows they can come to staff rather than having to confront the consultant. Project pricing is lump sum, so it if takes longer, they will take the time needed to get the result, rather than price adjustments. When the project is completed the final report is shared with the client, grantor, and team. They don't include everything, but there is a an after-action with the consultants which is "no holds barred." This is called a team critique; sometimes he participates but he always gets the information that results. This helps them learn about both clients and consultants and can guide them in the future. Sometimes there is a report that certain consultants should not work with certain other consultants. Q: Is the "sanitized" report used for marketing? Not the full report, but hopefully a complimentary quote is obtained and utilized. They do not ask specific permission to quote ~~**but it .**~~

If affiliates are willing, they can send their contract document to Darlyne and she will attempt to put it on the website.

Paul: Quality product depends on quality consultants and quality clients. We are still working on the client quality.

Doyle: On coaching, the expectation is for a coach to contact the coachee by email in advance of each session, reminding them of the content of the last session, and a heads up of how to prepare for the upcoming session. Many of our consultants are not from a consulting background, and so they need help to put together a quality report. Doyle undertakes direct engagement in each final report. He also adds technical presentation skills which some consultants do not have. We have not had particularly good luck at getting back client feedback post-project. There is an immediate survey form and a 12-month review. We also solicit feedback from the consultants, and do not get good participation in that either. Vickie responded that they'd had a similarly low response rate to surveys they sent out. They have migrated to a call format with clients and consultants, and they now have a nearly 100% response rate. Doyle: Who does the calls? Vickie: Current consultants have been in this role (not those assigned to this project) but may move it to a staff function. They feel this would get them higher-quality feedback. The fact that this will happen is part of the MOU. Takes 15-20 minutes. Trudy says they put it in their contract.

Impact Broward: Kathy said this is very informative; not sure they're doing anything additional. Looking forward to receiving additional tools.

Michael: They've relied on survey methodology and gotten poor results. They need to think it through and make changes.

Vickie(Vicky) suggested "Client Readiness" as a topic for a future call. Kathy said they have a prominent foundation that has approached them and they are reluctant to take the engagement due to politics surrounding the parent organization of the foundation. Trudy has a strategic planning readiness checklist which they use. They value the truncated strategic plan they have adopted from OKC. Craig asked how we can know at the point of entry that they will be a difficult client. Doyle said we attempt to assess their willingness to change before we engage. Julie asked for Trudy's readiness checklist and she will send it to Darlyne. Darlyne said Client Readiness will make a great topic.

Susan: They sometimes see clients differently once they enter the engagement. She works mostly with short-term engagements such as a one-day planning. When the need is more long-term, they assign staff to be hands-on. Final reports also fall on staff. They do paper surveys at 6 and 12 months and get a decent response.

David: For Impact Broward, is there one item that has been especially impactful? Kathy said they are small, with 22 consultants. Knowing them individually, and knowing nonprofits well, has been to her advantage. She is directly involved with each project on at least an oversight basis. Darlyne: Does Impact Broward charge? Kathy said they are changing their model. She has been on board for 9 months and sees the need for this to change. David: Would a future conversation on how we set fees be helpful? Kathy said that would be very helpful to her and her strategic planning consultants. David: Would this be a call topic? Several said it would. Craig suggested gathering data in advance for a one-page synopsis. Kathy offered to do that for the group. David suggested the October 5th call be about fees. Julie, Ulea, David, Vickie are all happy to help.

David stressed the value of the conference taking on these topics strongly and urged attendance.