

ESC-US Peer Conference Call – January 17, 2019

Increasing Project Quality

Participants: Paul, Darlyne, Michael Williams, Joe Fleckinger, John Kratoski, Jody, Mike Guarini, Michael Towers, Yvonne, Craig, Sylvia

ESCCO REQUESTS ASSISTANCE FROM THE ESC-US AFFILIATE NETWORK IN THE FOLLOWING AREAS:

1. How does your affiliate assure project quality, including specific responsibilities?

Mike G – does the project continue to adhere to scope of work, letters of agreement, are you delivering the highest quality you can give the clients against specific measurable metrics – John – their process draw up contract with client, use it as a baseline, outline what we expect of clients as well, do checkins with clients about how they feel at midpoint and near end, also does that with consultants – uses staff or one of a small corps of specially trained consultants to monitor – Durham does too - Michael Williams: has project leads they assign to each project, at end spend time making sure all needs were met, try to define future opportunity – evaluating their training now– Mike Guarini goes back to client about 3 months later, follows up on how did it go, what are your observations – Michael Williams does that followup also – by phone less successful than they'd like – now changed to one hour followup live, agreed in contract – Darlyne: quality assessment anecdotal only? Michael and John both have survey instruments they use – Michael sees the followup leading to repeat clients

2. What actions does it take prior to, during, and in the wrap-up phase, related to quality?

Yvonne: Client stakeholders aware on front end of what is happening and also that they have a plan for what they will do with the results – Mike: Where do you tend to see the quality fall apart? Michael: Scope creep is an issue affecting the outcome, midpoint checkin helps with that – if consultant observes creep, timely to regroup and pull it back together – Craig: Sometimes the client falls off the timeline and that is something they have not necessarily solved – Mike: A lot of data-gathering up front, time consuming, sometimes sees quality lag at that point because it is long and lacks client interface – Craig sees success in scoping the project, but not all the project team has been present for it, and so they have to be brought up to speed – Sylvia: Consultant turnover mid-project, transition issues, which clients don't like – also lack of decisiveness on client side – valuable to have a client lead as well as a project team lead – Mike cautions that the client lead may not be high enough in the organization to speak for the client - Michael Williams tries to make sure the ED and the Board are aligned – Paul ED starts things off but adding the board rep is very important – Michael works hard to get board chair involved -

3. Are there followup steps that you take to bring about continuous quality improvement?

John: Feedback process helps us by asking consultant what areas they needed help in, should have been better trained in; also consultant advisory council looks at feedback session results plus other input from consultants – Joe: Is there an internal review process to review the report before it goes to the client? John: Give consultant feedback from client to help consultant improve their performance – Craig: They take the final report through a staff process prior to giving it to the client; also team critique to talk about how the project went, write a one-page report – Sylvia: sounds like an industry-standard best practice to review what went wrong, what went well, etc – Michael Williams: Director of Consulting and

he review reports prior to them going to client- fight mission creep through project manager weighing what they are seeing in the interim reports - Sylvia sees an operations manual as being a fundamental piece of quality management, so you can document improvements against what you have been doing; she talked about measurement, what we think contributes to quality such as need for more lead consultants, etc – Craig offered to share some materials they have developed – Darlyne: has anyone run into funders that ask you to document what you did and your results? Michael Williams has seen some requests but not a lot - John has seen some, funders seem to be more and more wanting feedback on how you moved the needle with a client – Darlyne: distinction between quality and impact

4. Do any affiliates have specific examples of an effort to improve quality, and its results?

John has had feedback from clients and even some funders of quality being dependent on which consultants were assigned – they put up emeritus status for consultants, to address consultant fatigue – doing internal, not client-facing service such as research – 10-20% of their corps needed to take this status –Darlyne: Have you ever faced unqualified consultants? He feels they do good screening on the front end. Michael Williams: Tries to do a very good job of interviewing and screening consultants, rejects far more than they accept – sends out calendar at beginning of year to identify blocks of time when they are not available – creating expectation of at least two projects per year – John said they do the same thing – Craig: How do you match consultants when you have that two per year expectation? An ongoing conversation! Pairing consultants (seasoned/less seasoned) helps also. Joe: all the big consulting firms have a quality control process – heard many of the terms throughout this call – engagement, assignments, clear expectations, independent assessment of report meeting engagement letter. Paul will follow up with Michael Deimler at BCG to see what they might be able to share on the subject of quality control.

Paul thanked everyone for their participation, and said he will be sending out notes of the call. If anyone wants to correct remarks attributed to them, please let Paul know.

Darlyne hopes for six of these calls this year. Jody has offered to do the next call, on the topic of coaching. Jody will further develop the aspects to be addressed and share them with the group. Calls are every other month, so March 21 at 2:30 Eastern will be the next call. Send thoughts to jyetzer@onesourcecenter.org

Consultant Post-Project Survey

* Your Name (first and last)

* Client Organization

* Name of Client Primary Contact or Coachee (first and last)

* Type of Project

- Blended
- Board Development
- Competitive Analysis
- Customized
- Financial Oversight Coaching
- Fund Development
- Human Resources
- Leadership Coaching
- Organizational Development
- Organizational Assessment
- Retreat Facilitation
- Strategic Planning

Other Consultant(s) on Project, if applicable

Co-consultant #1

Co-consultant #2

Co-consultant #3

Co-consultant #4

Just prior to beginning your work with {{ Q2 }}, how ready do you feel the organization was to embark on this project?

1- Not at all ready 2- Low readiness 3- Moderate readiness 4- High readiness 5- Completely ready

Comments

On a scale of 1-5, how would you describe {{ Q2 }}'s level of engagement during this project?

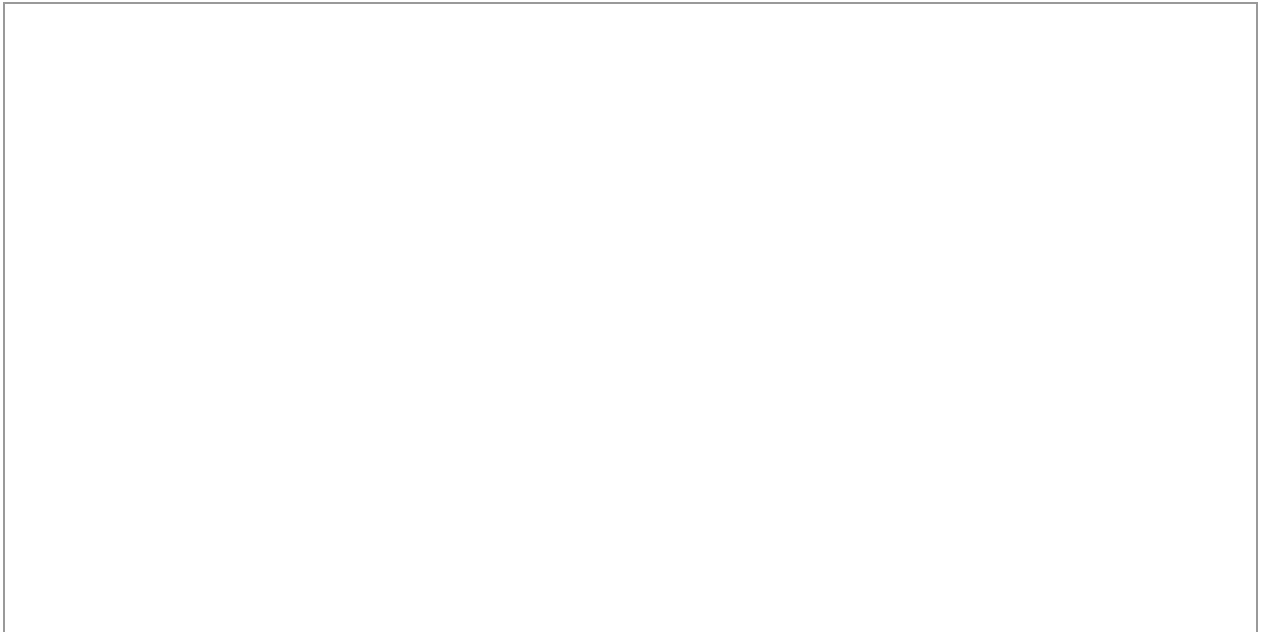
1- Not at all engaged 2- Minimally engaged 3- Average engagement 4- Highly engaged 5- Completely engaged

Comments

What went particularly well during this project?

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What could have gone better during this project?

A large, empty rectangular box with a thin black border, intended for the user to write their response to the question above.

On a scale of 1-5, how would you rate your level of satisfaction with your CONSULTANT TEAM?

1- Very Dissatisfied	2- Dissatisfied	3- Neither Satisfied nor Dissatisfied	4- Satisfied	5- Very Satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

Do you have any feedback on your consulting team - as a whole or as individual members?

- *Was there anything about the work style(s) your co-consultant(s) you particularly liked or disliked?*
- *Were you able to learn from your co-consultant(s)?*
- *How effective do you feel you and your co-consultant(s) were as a team?*

What do you feel was the greatest outcome or achievement of this project?

If there were written materials developed as part of this project, would you recommend ESC obtain a copy for use as a sales tool with prospective clients?

- N/A
- No
- Yes

(please describe which material/s we should obtain)

* Do you feel {{ Q2 }} would benefit from pursuing additional ESC projects in the coming year?

Yes

No

Unsure (please explain)

Just prior to beginning your work with {{ Q3 }}, how ready do you feel he/she was to embark on this coaching relationship?

1- Not at all ready 2- Low readiness 3- Moderate readiness 4- High readiness 5- Completely ready

Comments

On a scale of 1-5, how would you describe {{ Q3 }}'s level of engagement during this coaching relationship?

1- Not at all engaged 2- Minimally engaged 3- Average engagement 4- Highly engaged 5- Completely engaged

Comments

What went particularly well during this coaching assignment?

What could have gone better during this coaching assignment?

What do you feel was the greatest outcome or achievement of this coaching relationship?

* Do you feel {{ Q3 }} or {{ Q2 }} would benefit from re-contracting or pursuing additional ESC projects in the coming year?

- Yes
- No
- Unsure (please explain)

Which of the following projects would you recommend {{ Q2 }} pursue with ESC in the coming year? Select all that apply.

- Board Development
- Fund Development
- Leadership Coaching
- Organizational Assessment
- Strategic Planning
- EDLI (Executive Director Leadership Institute)
- DDP (Developing Development Program)
- Other (please explain)

Have you spoken with {{ Q2 }} and/or {{ Q3 }} about these ESC services?

- Yes No

Other/Comments

Do you recommend ESC contact {{ Q2 }} and/or {{ Q3 }} about these potential projects?

- Yes No

Other/Comments

Consultant Post-Project Survey

Now that your {{ Q4 }} project with {{ Q2 }} ({{ Q3 }}) has concluded, please rate your agreement with the following statements on a scale of 1-5:

	1- Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	N/A
A - This client is now better equipped to address the needs/issues which initially brought them to ESC.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B - Working with ESC helped this client operate more effectively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C - Completing this project improved this organization's ability to achieve its mission.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D - Working with ESC helped this client clarify their organization's next steps.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

On a scale of 1-5, how would you rate your OVERALL satisfaction with this project?

1- Very Dissatisfied	2- Dissatisfied	3- Neither Satisfied nor Dissatisfied	4- Satisfied	5- Very Satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

On a scale of 1-5, to what extent do you agree with the following statement:

All things considered, I feel I was a good match for this project.

1- Strongly disagree	2- Disagree	3- Neither agree nor disagree	4- Agree	5- Strongly agree
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

Would you work with this client ({{ Q2 }} or {{ Q3 }}) again?

- Yes
- No
- Maybe (please explain)

Is there anything ESC could have done to have better supported your work with {{ Q2 }}/{{ Q3 }}?

- No
- Yes (please specify)

Is there anything else we should know about this client, project, or your experience to be able to provide the highest quality and most effective services in the future?

Consultant Post-Project Survey

Thank you for completing this Post-Project Survey! Your responses and feedback are greatly appreciated.

If you have questions about this survey - or to provide feedback not explicitly addressed above - please contact Marissa Belau, Special Projects Coordinator (mbelau@escsc.org or 213-613-9103 x23).

□

Copy of Master ESC Client Engagement Evaluation - DO NOT ALTER THIS SURVEY

Survey Background & Instructions

You recently completed a project with ESC. Thank you for the opportunity to work with you. We would appreciate you giving us feedback on the project so that we can learn what works well and where we can improve our services.

The following project evaluation survey should take about 10 minutes to complete. Questions with an asterisk require an answer. Your comments in each area will help us improve our service.

Thank you again for the opportunity to work with you and for your thoughtful response to this evaluation.

Next

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Client Post-Project Interview

* Client Organization

* Name of Client Primary Contact or Coachee (first and last)

* Type of Project

- Blended
- Board Development
- Competitive Analysis
- Customized
- Financial Oversight Coaching
- Fund Development
- Human Resources
- Leadership Coaching
- Organizational Development
- Organizational Assessment
- Retreat Facilitation
- Strategic Planning

Name of Consultant(s) on Project

Consultant #1

Consultant #2

Consultant #3

Consultant #4

Consultant #5

What initially brought you/{{ Q1 }} to ESC for your {{ Q3 }} project?

- *What was the presenting issue/challenge for you/your organization?*
- *How did you hear about ESC?*

What do you feel went particularly well during this project?

What do you feel could have gone better during this project?

On a scale of 1-5, how would you rate your level of satisfaction with your CONSULTANT TEAM?

**Note: With the consultant team specifically, not overall satisfaction.*

1- Very Dissatisfied	2- Dissatisfied	3- Neither Satisfied nor Dissatisfied	4- Satisfied	5- Very Satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

Do you have any feedback on your consulting team - as a whole or as individual members?

- *Was there anything about your consultants' work styles you particularly liked or disliked?*
- *How effective do you feel you and your consultants were as a team?*
- *Do you feel the members of your consulting team were a good match for your organization?*

* Proceed to Outcomes and Satisfaction Questions

Yes

What initially brought you to ESC for {{ Q3 }}?

- *How did you hear about ESC?*

What do you feel went particularly well during this coaching engagement?

What do you feel could have gone better during this coaching engagement?

On a scale of 1-5, how would you rate your level of satisfaction with your COACH?

**Note: With the coach specifically, not overall satisfaction.*

1- Very Dissatisfied	2- Dissatisfied	3- Neither Satisfied nor Dissatisfied	4- Satisfied	5- Very Satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

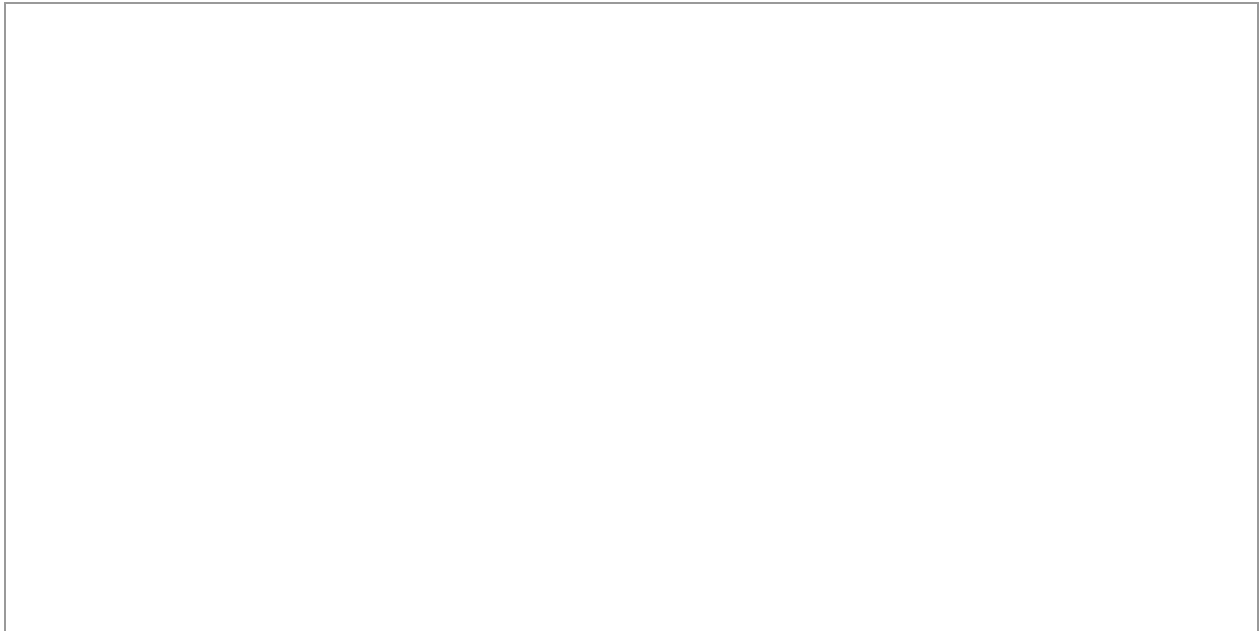
Comments

Do you have any specific feedback you'd like us to share with your coach?

- *Was there anything about your coach's work style that worked particularly well (or not so well) for you?*
- *Do you feel your coach was a good match for you?*
- *In terms of specific behaviors - and how your coach might be able to adjust these behaviors for future coaching engagements - is there anything your coach should ...*
 - *KEEP doing?*
 - *START doing?*
 - *STOP doing ?*

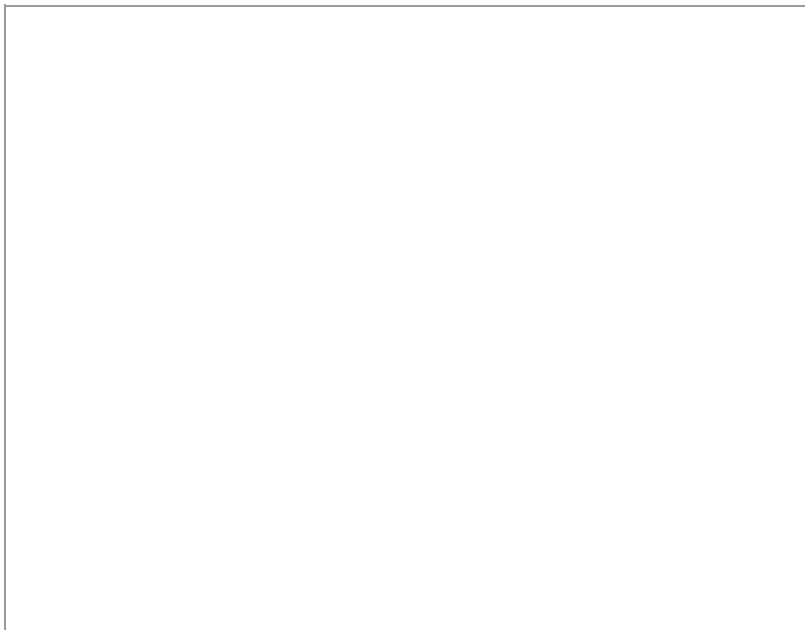


What do you feel was the greatest tangible outcome or achievement of this {{ Q3 }} engagement?



Are there any additional specific outcomes of this project that will have enduring value to you or {{ Q1 }}?

- *A year from now, how will you know that working with ESC had an impact on you/{{ Q1 }}?*



On a scale of 1-5, please rate your agreement with the following statements:

	1- Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	N/A
A - Our organization is now better equipped to address the needs/issues which initially brought us to ESC.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B - Working with ESC helped our organization operate more effectively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C - Completing this engagement improved our organization's ability to achieve our mission.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D - Working with ESC on this project helped clarify the next steps for our organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

On a scale of 1-5, how would you rate your OVERALL satisfaction with this {{ Q3 }} engagement?

1- Very Dissatisfied	2- Dissatisfied	3- Neither Satisfied nor Dissatisfied	4- Satisfied	5- Very Satisfied
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

What advice, if any, would you give to future clients working on similar {{ Q3 }} engagements with ESC?

On a scale of 1-5, please rate your agreement with the following statements:

	1- Strongly Disagree	2- Disagree	3- Neither Agree nor Disagree	4- Agree	5- Strongly Agree	N/A
A - Our organization received high quality services from ESC.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B - Our organization would work with ESC again if we had a need in the future.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If B was 4 or 5... Are there any immediate or near-future needs you would like to discuss with an ESC staff member?

On a scale of 1-10, how likely would you be to recommend ESC to colleagues facing similar issues?

1 10

* *If above score was 8, 9, or 10...* Would you mind if ESC used you as a reference when speaking with potential clients?

- Response above was NOT 8, 9, or 10
- Yes - use me as a reference!
- No - I'd prefer not.

* *If above response was "Yes"...* Is there any specific person or organization in your network we should reach out to about our services?

- Above response was NOT "Yes"
- No, can't think of any.
- Maybe, let me think about it.
- Yes! (please provide name of organization, name of contact, and contact information OR email introduction to Vicky/Julia)

Is there anything else we should know about this project or your experience to be able to provide the highest quality and most effective services in the future?

A large, empty rectangular box with a thin black border, intended for the respondent to provide additional information or experience related to the project and future service quality.

Client Post-Project Interview

[Need to re-work language to serve as easy template for Consultant Evaluators.]

Thank you for completing this Post-Project Interview! Your responses and feedback are greatly appreciated.

If you have questions about this survey - or to provide feedback not explicitly addressed above - please contact Marissa Belau, Special Projects Coordinator (mbelau@escsc.org or 213-613-9103 x23).

Craig Kowalski's comments on Quality Call

Evident, those participating on the call are all in agreement in striving for quality service. Here are some thoughts:

- would be helpful to know which affiliates were represented (11 persons repr 7-8 affiliates?)
- very good discussion - some of my take-aways:
 - o we are all trying to ensure and improve quality
 - o consistency, process, coordination, check-ins and reviews during and at project completion are methods
 - o measurement is hard; clients and funders want metrics for impact
 - o screening volunteer candidates and matching for project assignment is effective method for quality assurance
 - o consultant training and evaluation is important
 - o post project client satisfaction, follow-up and internal consultant evaluations are key (including lessons learned, what worked, what didn't, what could be done better in future)

I didn't chime in on Darlyne's question on funder reporting. We always provide a report at the completion of a grant period (prior to applying to the next grant cycle). Most of our funders require some report (I've written many, around 2-4 per year depending on grant success), and I think the reports are important (spend a good amount of time trying to make them good) but typically the funders are willing to accept pretty much any report, and don't seem to put much time in review. Part of the challenge is trying to show the impact of consulting - how many more homeless housed, mouths fed, addicted persons treated....because organization improved operations, strengthened their board or adopted a strategic plan? I've often cited this example: one of our clients told us we helped them save \$6 million (large public school district - several projects), big impact! But how do you compare that with the Children's Home saving 24 kids from abuse?

Some funders provide a suggested format, but allow whatever we want to use. One of our perennial funders - a big funder of many nonprofits, told me that our reports were much more in-depth than anyone else's - but it was clear they didn't take a lot of time reading them. In this case, we annually meet with the funder and walk them through a short typed report that we then leave with them. The meetings have helped foster a good relationship and trust that we will use their funds wisely (even if metrics are hard to determine) - they understand the ESC concept of helping nonprofits through subsidizing their fee to hire us for needed consulting assistance (as opposed of direct funds to nonprofits). The grant application earmarks specific consulting work with specific nonprofits (e.g., strategic planning for New Life Mission)- typically 5-6 projects.

After typing all that, obviously more than we would have had time to discuss - but the key thing is trying to figure out how to ensure we are providing quality work - so far, only feedback is that funder has continuously provided a \$30-50k grant annually going back more than 8 years (I started writing them in 2010).



OneSource Consulting Services Workflow Process Responsibilities Charts, January 2019

Formerly Executive Service Corps of Cincinnati (or ESCC)

PRE-PROJECT PHASE: RESPONSIBILITIES: DEFINITION THROUGH CONTRACT STAFF*, PROJECT ASSESSOR (PA)**, PROJECT MANAGER (PM) Files: Project Definition Report (PDR), Scope of Services (Scope), Consulting Agreement (CA), Signed Consulting Agreement (SCA)			
PROJECT ASSESSOR (staff assigned)	PROJECT MANAGER (staff assigned)	STAFF	Administrative
<i>(Project Definition Report)***</i>	<i>(Scope of Services)***</i>	<i>(Consulting Agreement)***</i>	<i>(Documents)***</i>
<ul style="list-style-type: none"> • DEVELOP PROJECT • ASSIST STAFF IN ENGAGING PM • PREPARE FOR & ATTEND DISCOVERY MEETING • COMPLETE PROJECT DEFINITION REPORT • ASSIST PM IN COMPLETING PROJECT SCOPE • ASSIST STAFF IN DEVELOPING CONSULTING AGREEMENT (AND IN REVISING, IF NEEDED) 	<ul style="list-style-type: none"> • PREPARE FOR & ATTEND DISCOVERY MEETING WITH PA • ASSIST IN DEVELOPING PROJECT SCOPE • COMPLETE PROJECT SCOPE • REVISE SCOPE, IF NEEDED • PROVIDE INPUT ON TEAM COMPOSITION PRE-SCA • POST SCA, COORDINATE WITH M-VS FOR TEAM COMPOSITION 	<ul style="list-style-type: none"> • RESPOND TO LEAD • ASSIGN PA (FROM LEAD, RFA OR FIRST CONTACT WITH POTENTIAL CLIENT) • SELECT & ENGAGE PM (ALERT M-VS TO START TO IDENTIFY POTENTIAL TEAMMATES) • DEVELOP CONSULTING AGREEMENT (INCLUDING DETERMINING PROJECT FEE AND GRANT, IF APPLICABLE) • SEND CONSULTING AGREEMENT TO CLIENT FOR QUESTIONS, REVISIONS AND APPROVAL • WHEN SCA RECEIVED, NOTIFY PM, M-VS AND AA CONFIRM PM • M-VS RECRUITS TEAMMATE(S) 	<ul style="list-style-type: none"> • START PROJECT DEFINITION REPORT (PDR) AND SCOPE OF SERVICES DOCUMENT • PREPARE CONSULTING AGREEMENT (CA) • ARCHIVE SIGNED CONSULTING AGREEMENT (SCA) • SET UP IN QB, INPUT TRACKING DATA, SEND FIRST INVOICE • POST SCA, CREATE THE FOLLOWING AND ARCHIVE FOR LATER ACCESS: <ul style="list-style-type: none"> - APPROVED SCOPE - MIDTERM BLANK - FINAL REPORT BLANK ARCHIVED FILES MAY ALSO BE FILED IN VOLUNTEER RESOURCES ON OS WEBSITE <i>(TO BE DEVELOPED)</i>

Staff includes: CEO; Director, Consulting Services (D-CS); Manager, Consulting Services (M-CS); Manager, Volunteer Services (M-VS); and Administrative Assistant (AA). ** Project Assessors include appointed volunteers as well as staff. * Key deliverable responsibility.*



Formerly Executive Service Corps of Cincinnati (or ESCC)

RESPONSIBILITIES PROJECT PHASE: PROJECT PLAN, MIDTERM, FINAL REPORT STAFF*, PROJECT ASSESSOR (PA)**, PROJECT MANAGER (PM) Files: Project Plan, Midterm Check-in, Addendum (if needed), Final Report	
<i>PROJECT ASSESSOR FORMAL RESPONSIBILITIES END WITH SCA, BUT PA MAY CONTINUE AS RESOURCE TO PROJECT MANAGER (OUTSIDE PROJECT MEETINGS); ALSO MAY BE INVOLVED IN ADDENDUM DEVELOPMENT IF APPROVED SCOPE CHANGES.</i>	
PROJECT MANAGER	STAFF
<i>(Project Plan, Final Report)***</i>	<i>(Midterm Check-in, Addendum, Final Report)***</i>
<ul style="list-style-type: none"> • ASSEMBLE PROJECT TEAM • COORDINATE WITH PROJECT TEAM TO DEVELOP PROJECT PLAN • LEAD PROJECT AND SERVE AS PRIMARY CLIENT CONTACT • RESPOND TO STAFF MIDTERM CHECK-IN (D-CS, M-CS) • PROVIDE SCOPE OF ADDENDUM, IF NEEDED, TO STAFF • AT FINAL PROJECT MEETING, GET CLIENT CONCURRENCE THAT PROJECT IS COMPLETE (OR DETERMINE WHAT IS STILL NEEDED) • DRAFT FINAL REPORT AND SEND TO STAFF FOR INPUT AND APPROVAL 	<ul style="list-style-type: none"> • COORDINATE WITH PM AS NEEDED • CHECK IN WITH PM AT MID-TERM AND COORDINATE WITH PM TO RESOLVE ANY NEEDS OR ISSUES • IF NEEDED, ASSIST PM IN DEVELOPING ADDENDUM • PROVIDE FINAL REPORT FORM (WITH TOP COMPLETED) TO PROJECT MANAGER TO DRAFT FOR CLIENT APPROVAL • APPROVE FINAL REPORT, SEND TO CLIENT FOR APPROVAL AND COMMENT • AFTER CLIENT RESPONSE, SEND FINAL INVOICE

Staff includes: CEO; Director, Consulting Services (D-CS); Manager, Consulting Services (M-CS); Manager, Volunteer Services (M-VS); and Administrative Assistant (AA). ** Project Assessors include appointed volunteers as well as staff. * Key deliverable responsibility.*



Formerly Executive Service Corps of Cincinnati (or ESCC)

RESPONSIBILITIES	
POST PROJECT PHASE: TEAM CRITIQUE, CLIENT EVALUATION, FOLLOW-UP, IMPACT STUDY	
STAFF*, PROJECT ASSESSOR (PA)**, PROJECT MANAGER (PM)	
Files: Team Critique, Client Evaluation, Follow-up Notes, Impact Study Report, Scope	
PROJECT MANAGER	STAFF
<i>(Team Critique, Six Month Follow-up)***</i>	<i>(Client Evaluation, Six Month Follow-up, Impact Study Report)***</i>
<ul style="list-style-type: none"> • COORDINATE (INVITE PROJECT CONTRIBUTORS) AND ATTEND TEAM CRITIQUE • DRAFT TEAM CRITIQUE AND SEND TO STAFF • SHARE CLIENT FEEDBACK WITH ALL PROJECT TEAM CONTRIBUTORS • PARTICIPATE IN 6 MONTH FOLLOW-UP (OPTIONAL - COORDINATE WITH STAFF) • PARTICIPATE IN IMPACT STUDY, IF NEEDED (STAFF TO DETERMINE) 	<ul style="list-style-type: none"> • ATTEND TEAM CRITIQUE (OPTIONAL) • COORDINATE 6 MONTH FOLLOW-UP (ATTENDANCE IS OPTIONAL) • SEND CLIENT EVALUATION AND INVOICE TO CLIENT • SHARE CLIENT FEEDBACK WITH PA, PM AND TEAM • ARCHIVE FILES ON SERVER • PARTICIPATE IN FOLLOW-UP IF NEEDED • DIRECT IMPACT STUDY FOR SELECTED PROJECTS (NO SOONER THAN ONE YEAR AFTER DISENGAGEMENT FROM CLIENT) • COMPLETE PROJECT TRACKING AND FILE ARCHIVING

Staff includes: CEO; Director, Consulting Services (D-CS); Manager, Consulting Services (M-CS); Manager, Volunteer Services (M-VS); and Administrative Assistant (AA). ** Project Assessors include appointed volunteers as well as staff. * Key deliverable responsibility.*