**ESC-US Peer Conference Call – January 17, 2019**

**Increasing Project Quality**

Participants: Paul, Darlyne, Michael Williams, Joe Fleckinger, John Kratowski, 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

1. 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 -

1. 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

1. 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](mailto:jyetzer@onesourcecenter.org)