



CSVC

Center for Social Value Creation

ROBERT H. SMITH
SCHOOL OF BUSINESS
AT THE UNIVERSITY OF MARYLAND



Grassroots.org

Grassroots.org Social Venture Consulting Program 2011 – 2012

**Client
Handbook**

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Welcome

Welcome

We are pleased to welcome you to the Grassroots.org Social Venture Consulting Program. We look forward to working with you this semester!

Since 2006, nearly 300 full- and part-time MBA students have assisted more than 75 nonprofit organizations across the United States in projects meant to increase organizational capacity. Nonprofit clients typically span a range of service areas, including the environment, health, human services, arts and education.

This program is one of the ways in which business schools around the country are developing leaders with the knowledge and skills to use business as a vehicle for social change. Each semester's projects are meant to provide clients with the opportunity to increase their capacity and make business-oriented changes while enabling our consultants to build new skills in project management and leadership, applying the principles learned in the classroom through hands-on experiences. Thank you for providing our students with the chance to learn more about the ways in which business skills can be applied in the nonprofit sector while making a difference in the community.

Due to overwhelming demand to participate, the student selection process is very competitive. It is comprised of two elements: finding the right consultant for each project and identifying student partners who will complement each other.

Interested students submit applications expressing their interest in specific projects. Out of the pool of applicants, a select group of students are invited to interview and from that group the consultants are selected and paired up with clients.

We look for students who have a demonstrated interest in and commitment to the program, the client and the project. Specifically, we look for students with the necessary skill sets and experiences needed to complete each project as well as round out the team.

Client Perspective

"Working with MBA students AP and James was a rewarding experience for FutureSelf. They were committed, professional and provided valuable products that we can continue to use and modify on an ongoing basis. They also provided insights into many topics that we had not yet considered. Thank you for providing this service to our nonprofit, from which we should benefit for many years!"

–Sara Gallagher, Futureself
Fall 2010 Client

Behind the Scenes

After your organization completed the selection process, a similar selection process began for our student consultants. Project descriptions were presented to student applicants at a series of informational meetings.

The Process

The Process

The program staff will provide the Client with a team of students qualified to work on this project. This team will provide its best efforts during the consulting process and will provide the Client with a deliverable that meets the requested objective.

There are three general phases to the consulting process: information gathering, implementation, and evaluation/review. The entire process is conducted throughout approximately 60 to 80 hours during the course of the semester. Teams have roughly 14 weeks to complete their projects. The approximate semester dates are as follows:

Fall semester:

First week of September – Early December

Spring Semester:

First week of February – Early May

Phase I: Scope Document & Preliminary Information

After teams and clients have been introduced, the next phase of the project begins.

In this phase, teams will meet with their contact at your organization to discuss the project in greater detail. During this meeting please provide your consultant team with as much information about your organization and specific objective(s) as possible. The students will use the information to develop a more detailed *Scope Document* which provides additional information about what deliverables the group will provide during the

project period. The scope document should be completed and approved within two weeks of the students receiving their assignment.

The scope document will detail:

- Time frame
- Key deliverables
- Research required
- Data collection
- Any custom development (forms, database work, etc.)

Phase II: Implementation

This phase begins once the scope document is complete, and concludes with the presentation of final deliverables to the client. During this phase, teams will spend a majority of their time on the following tasks:

- Completing the tasks outlined in the scope document and particular to the chosen methodologies
 - Collecting data
 - Analyzing research
 - Developing strategies
 - Crafting recommendations
 - Building any tools or creating any materials
- Having bi-weekly calls/meetings with the client to share results and ask questions (minimum—you may need to meet more frequently, depending on project type and client needs)
- Having bi-weekly calls/meetings with center staff to provide updates on the project and any needs, questions or concerns
- Submitting drafts to client and

center staff for review; making any necessary revisions and repeating.

Phase III: Evaluation & Review

You are expected to work with the consultant teams to identify what final deliverable(s) you would like and by what date.

Separate from this is an evening presentation and reception at the host school. During this presentation, teams have an opportunity to share their learning with each other, client organizations and the greater business school community. We hope that someone from your organization can attend this special event.

During the course of the semester and upon completion of the project, program staff will follow up with both you and the student consultants to assess impact and gauge satisfaction with the overall program.

You will be asked to fill out several surveys—please do not neglect to respond, as these are an important part of continuing to improve the program and assess the impact it has on the populations we serve.

Client Obligations & Rights

Internal Support and Resource Availability

The Client has reviewed the materials supplied to it by the program staff. The Client understands, as described in those materials, the general process that the Grassroots.org Social Venture Consulting Program has created to provide a student team to work with the members of the Client Team and understands the expectations of them.

Consultants are both part-time and full-time students in the MBA program, and some are working professionals as well. Although communication between Clients and Consultants is critical, meeting type (in-person and conference call) and duration will be determined by the Consultant Team, with approval from the Client. Client may need to allocate some time for off-hour meetings with the consultants.

Liability & Indemnification

Client understands that the volunteers are not employees, agents or contractors of the Grassroots.org Social Venture Consulting Program and that the program is not responsible for the actions of its volunteers. However, should any concerns on behalf of the Client arise, we ask you to contact program staff immediately.

Evaluation

We believe very strongly in both process and outcomes-based evaluation of the program. Client agrees to work

with the program staff before, during, and one year after the engagement to evaluate the impact of the project.

Permission

Client grants the program the right to use the results, materials and products developed under this Agreement for any purposes consistent with the program's mission. We may use the Client's name, logo and case study in the program's print and digital communications such as website, newsletters and press releases.

FAQs

1. What does a successful project look like?

A successful consulting project has two main components. First, the final deliverables are usable from a client perspective. They are practical recommendations and/or solutions that match the client's capabilities.

Second, a successful project is a learning process for the consultant. It will have allowed students to build new skills, while also increasing awareness of the ability to have an impact in the social sector.

2. We have seen two rounds of the Scope Document and are still unsatisfied with the quality of the results.

Contact the program staff and let them know about your feelings immediately. We are highly dedicated to the success of our projects and to client satisfaction and will ensure that students receive the guidance they need to be successful

3. I haven't heard from my consultants in weeks and I'm not sure what they're working on. What do I do?

If at any time you are having trouble getting feedback from your consultants or you feel they aren't meeting project deadlines, alert the program staff immediately. Together, we will assess the problem and develop a solution. The most important thing is to communicate!

4. Our organization's strategy or funding or priorities, etc. are about to change. How should we proceed?

Bring this to the attention of the program staff immediately, if possible even at a stage when you are aware of this change only as a possibility. Together you can evaluate what impact this has on the consulting project, and how the project can be modified if necessary.

GRASSROOTS.ORG SOCIAL VENTURE CONSULTING PROGRAM

---- SAMPLE SCOPE DOCUMENT ---- (INSERT CLIENT NAME)

Introduction

Introduce the client, its mission, program information, the population(s) it serves, etc. What are the key issues the organization is currently facing? (For example, the current environment in which it operates, any budget cuts, recent changes, etc.) Set the stage for the project objectives below.

Objectives

Describe the objective(s) of your project. What are you/the client hoping to achieve? Why is the project being completed? How does this project relate to overall strategic goals of the organization? Define the problem/challenge you are facing and the expected benefits of your proposed solution. Optional (but encouraged) is an explanation of how results will be measured.

Deliverable Requirements

- Bullets of what you will deliver to the client. Be specific! Will you provide a written report that details the results of your research analysis? Key messages? Marketing materials? Use this section to explain the concrete, tangible outcomes that you will present to the client at the conclusion of the project.

Methodology

What activities or tasks will both you and the client complete to accomplish the desired outcomes? Describe your process. What steps will you take? How will you gather the information needed to make your recommendations or complete your analysis? (For example, primary research including surveys, interviews, focus groups, site visits, etc., and secondary research including case studies, literature reviews, benchmarking, reviewing best practices, etc.) Once you have gathered the data, how will you approach your analysis or formulate your recommendations?

Client's Responsibilities

- List the types of support you'll need from the client. Will you need documentation? If so, what specific documents? Support from personnel? Names/contacts for your interviews or focus groups? Particular dates that you want to meet? Outline your expectations for the client's commitments here.

Team Members' Responsibilities

- List each team member's skill sets that will be utilized on the project and the particular functional area that he or she will focus on. For example, Team Member A has strong skills in conducting secondary research, so he will focus on this piece of the project. This initial assessment of team members' skills and assets will help you to successfully complete your project work plan and outline your specific tasks and responsibilities (below).

Budget

What expenses will you incur while working on the project? Center staff regularly looks for relevant training classes for consultants to attend, and these can be covered with the project budget. Presentation materials, including printing, can also be reimbursed.

If you plan to travel outside of the DC/MD/VA area to meet with your client, provide an estimate of your travel expenses here. Airfare, car rental, and accommodations can be covered (though check with your client—many are happy to arrange for some of the above). *Reasonable* meal expenses, with itemized receipts, can also be covered. Alcohol cannot.

Full travel guidelines and procedures can be accessed on Blackboard.

Responsibilities/Tasks & Timeline

Focus on the major workstreams that are required and how you will separate tasks among team members, per the strengths and skill sets of team members identified above. The breakdown of tasks, deliverables, timeline and team member responsibilities is described in the following table. Several due dates have already been filled in for the completion of the scope document, the midpoint presentation and the final deliverables. The remaining tasks can be broken down by the specific methodologies you've chosen.

Project Work Plan

#	Task Description	Deliverable	Date Due	Date Complete	Team Lead
1.0	Project Planning				
1.1	Initial research/planning				
1.2	Client meeting	Client meeting			All
1.3	Follow up research/planning				
1.4	Draft project scope	Scope draft			
1.5	Call with client to discuss scope				

#	Task Description	Deliverable	Date Due	Date Complete	Team Lead
1.6	Finalize scope	Scope document			
2.0	Method 1				
2.1					
2.2					
2.3					
3.0	Method 2				
3.1					
3.2					
3.3					
3.4					
4.0	Midpoint Presentation				
4.1	Discussion meeting				All
4.2	Draft presentation	Draft presentation			
4.3	Dry Run	Present to SVC			
4.4	Revise presentation	Final presentation			
4.5	Deliver presentation	Client presentation			All
5.0	Method 3				
5.1					
5.2					
5.3					
5.4					
5.5					
6.0	Analysis/Recommendations				
6.1					
6.2					
6.3					
6.4					
6.5					
7.0	Final Report & Presentation				
7.1	Discussion meeting				All
7.2	Draft report	Draft report			
7.3	Draft presentation	Draft presentation			
7.4	Dry run presentation	Present to SVC			
7.5	Revise report				
7.6	Revise presentation	Final presentation			
7.7	Prepare final report	Final report			
7.8	Deliver presentation &	Finals to client			All

Signatures

Grassroots.org Social Venture Consulting Team

ABC Client

Name

Date

Name

Date

Name

Date

Name

Date

Name

Date