SERVICE UNITES

detroit

CONFERENCE ON VOLUNTEERING AND SERVICE

JUNE 27-29, 2016

Points of Light ✳ HandsOn Network ✳ generationOn ✳ Corporate Institute ✳ AmeriCorps Alums

Convened by:

POINTS OF LIGHT

Co-Title Sponsors:

JPMorgan Chase & Co.

ups

Track Sponsored by:

JPMorgan Chase & Co.

Maximizing Success Through Project Management

Kendall Lott, President/CEO M Powered Strategies

Rhonda Oliver, CEO, HandsOn Greater Phoenix

Track Sponsored by: JPMorgan Chase & Co.

Technopedia says…

- "A **project manager** is the person responsible for leading a **project** from its inception to execution. This includes planning, execution and managing the people, resources and scope of the **project**." (Technopedia)

Project Management Institute

What is Project Management?

The application of processes, methods, knowledge, skills and experience to achieve the **project** objectives.

What is a Project?

A temporary endeavor undertaken to create a unique product, service or result.

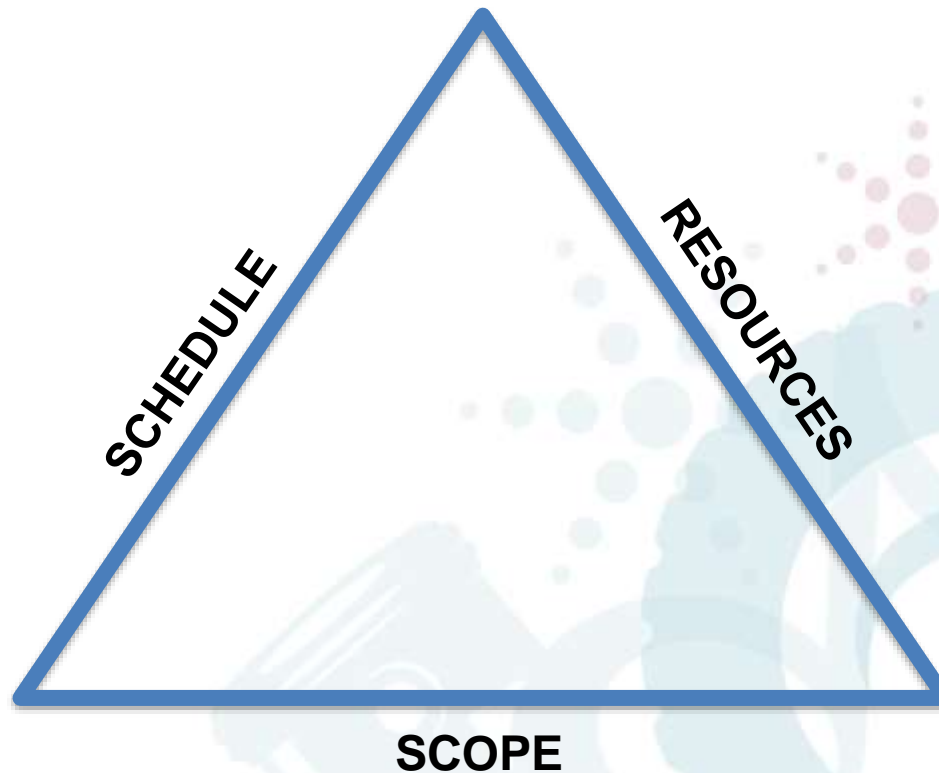Track Sponsored by: JPMORGAN CHASE & CO.

10 Knowledge Areas

Integration　　　　**Human Resources**

Scope　　　　　　　**Communication**

Time　　　　　　　　**Risk**

Cost　　　　　　　　**Procurement**

Quality　　　　　　 **Stakeholders**

Triple Constraint

The Five Part Triple Constraint

STAKEHOLDER EXPECTATIONS

SCHEDULE

RESOURCES

QUALITY

SCOPE
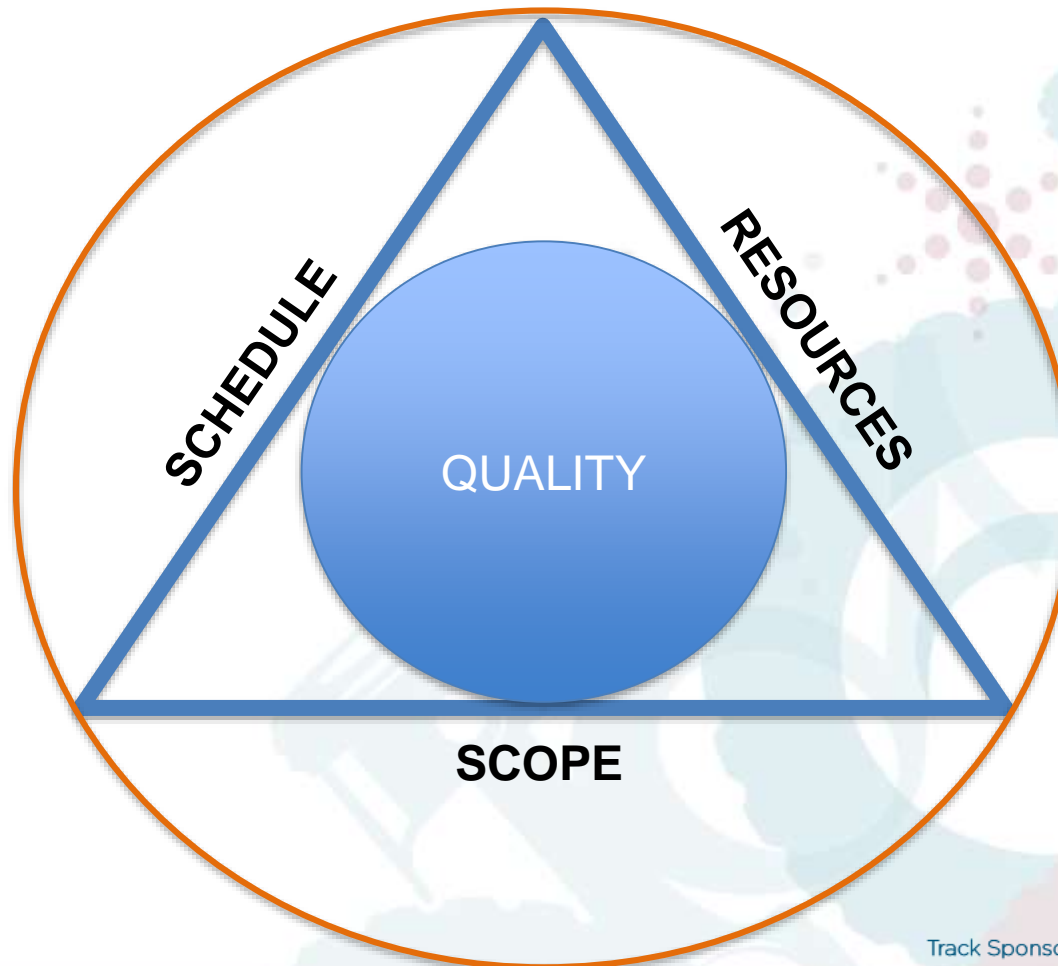
Track Sponsored by: JPMorgan Chase & Co.

What do you get?

Implementation of PM Processes

PM Processes, 89%

No PM Processes, 34%
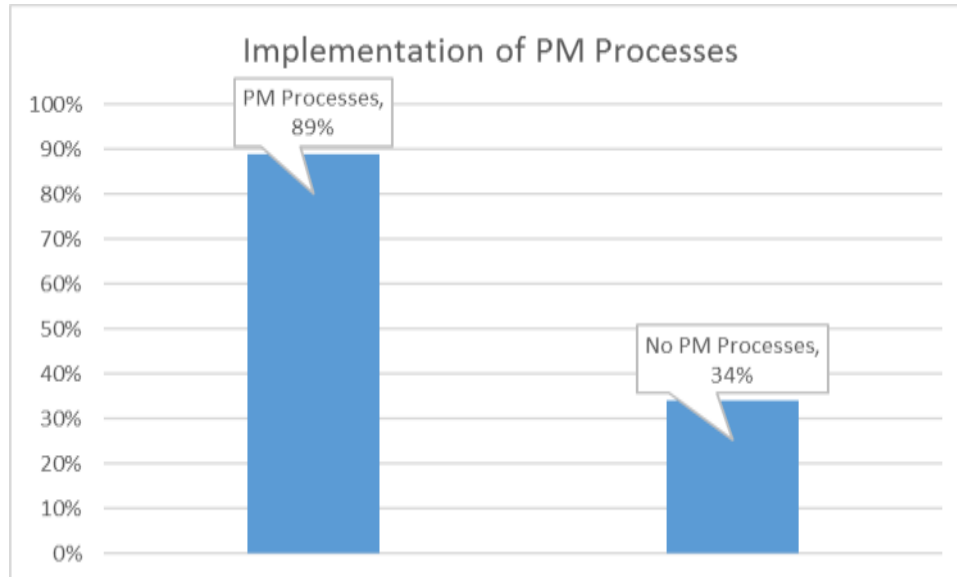
Organizations with PM Culture

71%

52%

High Priority

Low Priority
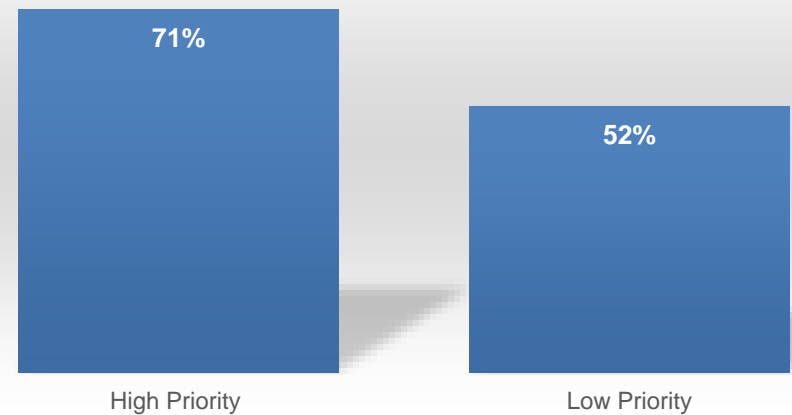
(Pulse of the Profession, PMI, 2016, pp. 7-8) Track Sponsored by: JPMorgan Chase & Co.

Bottom Line

- 80% of projects at most succeed
- 12%-14% cost savings

My Journey

- **Corporate Approach**
  - M Powered Strategies Community Engagement (MPS CEM)
- **Association Approach**
  - Project Management Day of Service (PMDOS with Local PMI Chapters)
- **Intermediary Approach**
  - Coach2Action Pilot (Points of Light with Service Enterprise Nonprofits)

Track Sponsored by: JPMORGAN CHASE & CO.

The MPS Approach

- Winrock Multiple Use Water Services (MUS) Team: Strategic Planning
- Talent Beyond Borders: Market Research, Stakeholder Communications and Customer Strategy
- POL Military Initiatives Division: Strategic Planning
- POL Coach2Action: Project Management and Program Planning /Project Design and Consulting
- POL Service Works: Project Management Consulting and Support
- Public Allies DC: Team Building and Professional Development (MBTI)
- PMI WDC: Management Work Styles and SDI Trainings

Track Sponsored by: JPMORGAN CHASE & CO.

"Projectize"

- MOU
- Charter (scope)
- Schedule
- Participants
- Verification
- Lessons Learned

Track Sponsored by: JPMORGAN CHASE & CO.

Not Enoughness

$$$$

Track Sponsored by: JPMORGAN CHASE & CO.

Scoping Projects: PMDOS

Track Sponsored by: JPMorgan Chase & Co.

PMDOS Learning

- Non Profit managers overwhelmingly like:
  - Clarification on scope
  - Related discussion on projects that are needed to meet the direction of the organization – its strategic

- Pent Up Supply of PM SBV Labor

Track Sponsored by: JPMORGAN CHASE & Co.

Beyond Scoping: C2A Pilot

- Determine the readiness of NPOs to use skilled volunteer service for operational capacity building

- Determine our ability to improve nonprofits' capacity for project design, development and management

- Develop a service model with professional associations

- Determine the viability of providing pro bono services virtually

It's a pilot for a reason

Testing the premise that 40 hours of virtual professional support, in under 90 days, effectively and measurably improves project design for NPs

- Improved project design
  - Improved likelihood of delivery on time
  - Identified areas for Skills Based Volunteer support
- Identified ideal PM support for NPO projects
  - Virtual, paired method
  - Can be implemented in the future for other aspects of the PM discipline
- Enhanced NP Business Practice
  - NPs should **identify (understand)** techniques that will help them in the future
  - NPs will find the discipline helpful and want to implement it themselves

Track Sponsored by: JPMorgan Chase & Co.

Pretty Picture

Nov 6 - Jan 10 ▬▬▬▬▬▬▬▬▬▬ **Pilot Preparation**

Jan 12 - Mar 15 ▬▬▬▬▬▬▬▬▬▬▬▬ **Project Coaching**

Mar 16 - Mar 31 ▬▬▬ **Close Out**

Coach Connections #4
Feb 29

Project Coach Orientations #1
Nov 6

"About Me" profile due to Points of Light
Nov 20

Coach Connections #1
Jan 18

Giving Tuesday: Matches Announced
Dec 1

Coach Connections #2
Feb 1

Return Closing and Lessons Learned Docs
Mar 29

2015

2016

| Nov | Dec | Jan | Feb | Mar | **2016** |

Today

Nov 16
Project Coach Orientations #2

Jan 22
Starting Document due

Mar 14
Coach Connections #5

Dec 18
Send Final Coaching Artifacts and invite to training

Feb 15
Coach Connections #3

Jan 11
Pilot training webinar (will be 2 dates as opitions)

SERVICEUNITES

Key Pilot Milestones

- Designed Pilot, scope/schedule/staffing
- Developed Milestone Roadmap and related artifact templates
- Set up Project Management repository for schedules and documentation for the pilot and from the projects
- Registered 30 NPs
- Developed PM Coach recruiting info and launched to PMI Chapters
- Presented Orientation webinars
- Connected Coaches and NP Managers
- Presented Training Webinars
- Regular communications during the pilot
- Collected final status

Track Sponsored by: JPMORGAN CHASE & CO.

Project Maturity Roadmap

Starting Document

Track Sponsored by: JPMORGAN CHASE & CO.

Closing Document

Project Types

TYPES OF CAPACITY-BUILDING PROJECTS
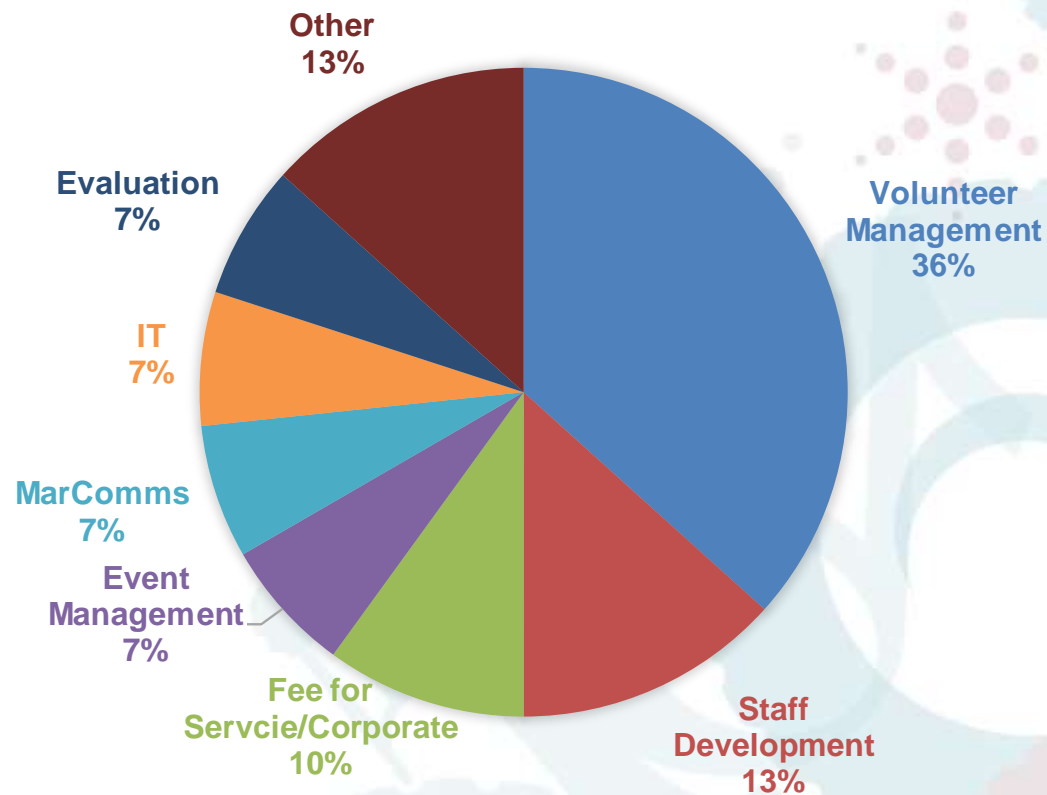
Track Sponsored by: JPMorgan Chase & Co.

Minnesota Children's Museum

SERVICEUNITES

Minnesota Children's Museum

A. General Information

Project Title:	**Coach2Action Maturity Project:** Minnesota Children's Museum strategic plan for increasing volunteer engagement and utilization in the new museum
NPO Name	Minnesota Children's Museum
Brief C2A Project Description:	The C2A Action Team will support and assist MCM to achieve their goals and strategies based on their Action Plan
Period of Performance	January 12, 2016 – March 15, 2016; 20 hours of project coaching
Prepared By:	Heidi Jaeger, Joseph Costello, Kate Errickson
Date:	March 9, 2016	Version: 1.0

B. C2A Project Maturity Completed Deliverables

Based upon the Project Maturity Roadmap worksheet, indicate in the list below the deliverables (activities/artifacts) that were not applicable for the Engagement, Planned for the Engagement, and Completed during the Engagement by checking the appropriate boxes.

Not Applicable	Planned for Engagement	Completed during Engagement	Roadmap Stage	Artifact
☐	☒	☒	1) Define Scope	Project Scope Statement
☐	☒	☒	2) Define Work	Work Breakdown Structure
☐	☒	☒	3) Define Milestones	Milestone List
☐	☒	☒	4) Sequence Activities	Project Schedule Network Diagram
☐	☒	☒	5) Estimate Activity Resources	Activity Resource Requirements
☐	☒	☒	6) Estimate Activity Durations	Activity Duration Estimates
☐	☒	☒	7) Develop Schedule	Schedule Baseline
☒	☐	☐	8) Plan Human Resources	Staffing Plan
☒	☐	☐	8) Plan Human Resources	Volunteer Position Descriptions

- Consolidated annual plans into WBS format, with dependencies, milestones and dates
- Explained execution and documentation of a risk analysis
- RACI model
- Graphical Dashboard representing all projects status (replacing 5-page narrative)

Track Sponsored by: JPMORGAN CHASE & CO.

WHW

A. General Information

Project Title:	Coach2Action Maturity Project: *Streamlining Volunteer Onboarding Process*
NPO Name	WHW
Brief C2A Project Description:	*Create a process to streamline the volunteer onboarding process by implementing the volunteer Saleforce application; create training; update policies and procedures.*
Period of Performance	January 12, 2016 – March 15, 2016; 20 hours of project coaching
Prepared By:	Lynn Mathenia, Terry Moede, Lizet Cejas
Date:	3/15/2016 · Version: 1.0

B. C2A Project Maturity Completed Deliverables

Based upon the Project Maturity Roadmap worksheet, indicate in the list below the deliverables (activities/artifacts) that were not applicable for the Engagement, Planned for the Engagement, and Completed during the Engagement by checking the appropriate boxes.

Not Applicable	Planned for Engagement	Completed during Engagement	Roadmap Stage	Artifact
☐	☒	☒	1) Define Scope	Project Scope Statement
☐	☒	☒	2) Define Work	Work Breakdown Structure
☐	☒	☒	3) Define Milestones	Milestone List
☒	☐	☒	4) Sequence Activities	Project Schedule Network Diagram
☒	☐	☐	5) Estimate Activity Resources	Activity Resource Requirements
☒	☐	☐	6) Estimate Activity Durations	Activity Duration Estimates
☐	☒	☒	7) Develop Schedule	Schedule Baseline
☐	☒	☒	8) Plan Human Resources	Staffing Plan
☐	☒	☐	9) Plan Human Resources	Volunteer Position Descriptions

- Full project plan developed with constraints, assumptions, end state, in/out of scope, timeline
- Process flow for on-boarding
- "The provided project tools and coaching assistance by provided examples on how to deal with scope creep, setting leadership expectations and flexible management of rapidly changing timelines."

Track Sponsored by: JPMORGAN CHASE & CO.

Center For Volunteer and Non Profit Leadership

- Survey Design
- Pricing Model
- Competitor Analysis

Catherine McAuley Center

- New funding strategy
- New volunteer strategy
- Clarified roles and responsibilities for volunteers
- Project documentation for future projects

Track Sponsored by: JPMorgan Chase & Co.

Jersey Cares Inc.

A. General Information

Project Title:	Coach2Action Maturity Project: Enhancing the volunteer onboarding process
NPO Name	Goochland Free Clinic and Family Services
Brief C2A Project Description:	The C2A project team will develop a plan for Goochland Free Clinic and Family Services to effectively manage the volunteering onboarding process.
Period of Performance	January 12, 2016 – March 15, 2016; 20 hours of project coaching
Prepared By:	Laura Marotta, Chidananda Sulur
Date:	3/11/2016 Version: 1

B. C2A Project Maturity Completed Deliverables

The Project Maturity Roadmap provides the framework for activities and artifacts to establish a plan for the NPO to mature their project and increase positive project outcomes. The Roadmap should be reviewed for completeness of activities and artifacts based upon a discussion between the project coaches and NPOs at the conclusion of the engagement.

Based upon the Project Maturity Roadmap worksheet, indicate in the list below the deliverables (activities/artifacts) that were not applicable for the Engagement, Planned for the Engagement, and Completed during the Engagement by checking the appropriate boxes.

Not Applicable	Planned for Engagement	Completed during Engagement		Roadmap Stage	Artifact
☐	✓ ☐	✓ ☐	1)	Define Scope	Project Scope Statement
☐	✓ ☐	✓ ☐	2)	Define Work	Work Breakdown Structure
☐	☐	☐	3)	Define Milestones	Milestone List
☐	☐	☐	4)	Sequence Activities	Project Schedule Network Diagram
☐	✓ ☐	✓ ☐	5)	Estimate Activity Resources	Activity Resource Requirements
☐	✓ ☐	✓ ☐	6)	Estimate Activity Durations	Activity Duration Estimates
☐	✓ ☐	✓ ☐	7)	Develop Schedule	Schedule Baseline
☐	✓ ☐	✓ ☐	8)	Plan Human Resources	Staffing Plan
✓ ☐	☐	☐	8)	Plan Human Resources	Volunteer Position Descriptions

- Process flow for volunteer acquisition
  - Participants
  - Key Activities
  - Decision Points
  - Related documents
- Volunteer marketing plan to engage, plan for and monitor Skills Based Volunteer engagements
- Templates for future projects

HandsOn Greater Phoenix

Project Title:	Designing and Marketing a Team Building Offering
NPO Name	HandsOn Greater Phoenix
Brief C2A Project Description:	The C2A Team (Mark and April) will help HGP to define and develop a team building service offering and associated marketing plan.
Period of Performance	January 12, 2016 – March 15, 2016; 20 hours of project coaching
Prepared By:	Mark Muir, April Wiaczek
Date:	3/10/16	Version:	1.0

Not Applicable	Planned for Engagement	Completed during Engagement	Roadmap Stage	Artifact
☐	☐	☒	1) Define Scope	Project Scope Statement
☐	☐	☒	2) Define Work	Work Breakdown Structure
☐	☐	☒	3) Define Milestones	Milestone List
☐	☐	☒	4) Sequence Activities	Project Schedule Network Diagram
☐	☐	☒	5) Estimate Activity Resources	Activity Resource Requirements
☐	☐	☒	6) Estimate Activity Durations	Activity Duration Estimates
☐	☐	☒	7) Develop Schedule	Schedule Baseline
☐	☐	☒	8) Plan Human Resources	Staffing Plan
☐	☐	☒	8) Plan Human Resources	Volunteer Position Descriptions

Track Sponsored by: JPMORGAN CHASE & CO.

Pilot Outcomes

30 Nonprofits

60 Project Managers

1,200+ Volunteer Hours

Organizations created plans that collectively will engage almost 1,600 Volunteers*

70% of Responding Organizations would participate again

*Volunteer engagement plan is approximately 98 per volunteers per project plan.

Track Sponsored by: JPMorgan Chase & Co.

Pilot Outputs
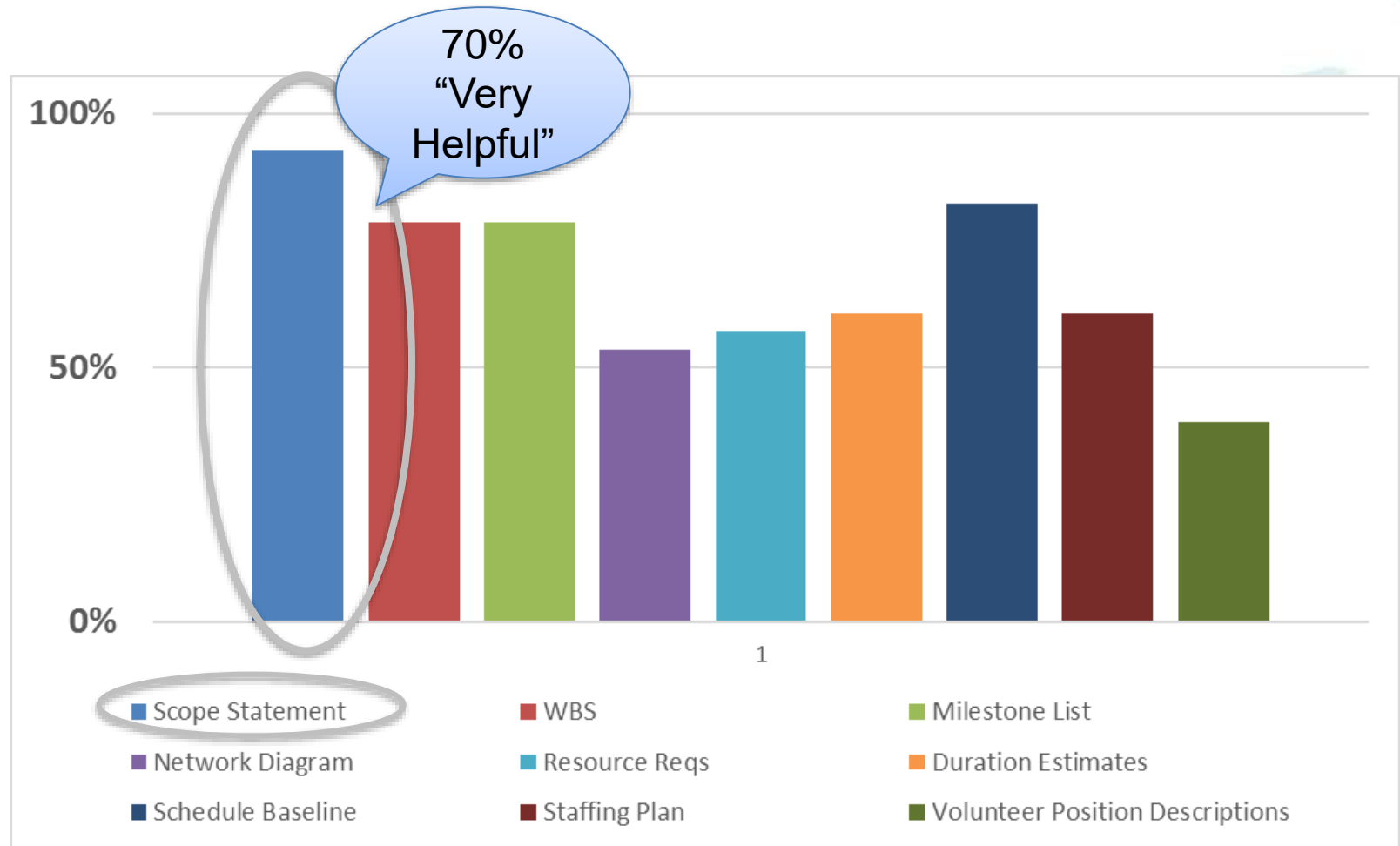
Non Profit Perspective
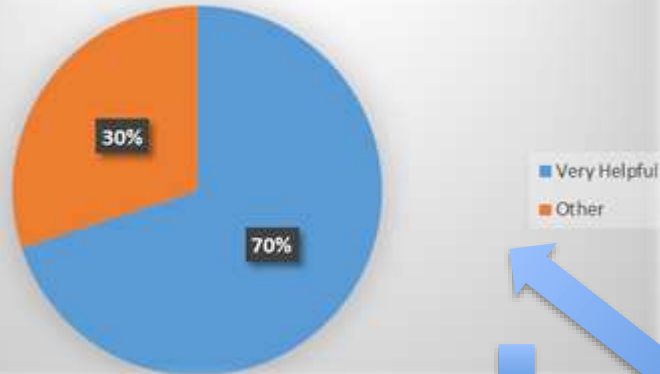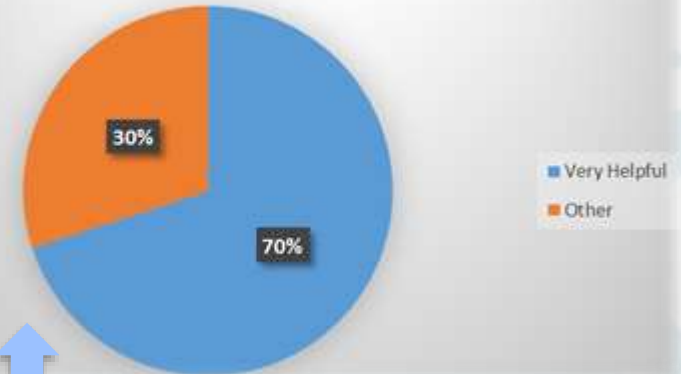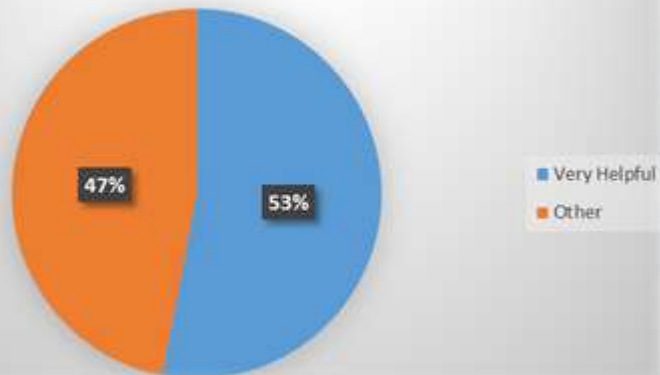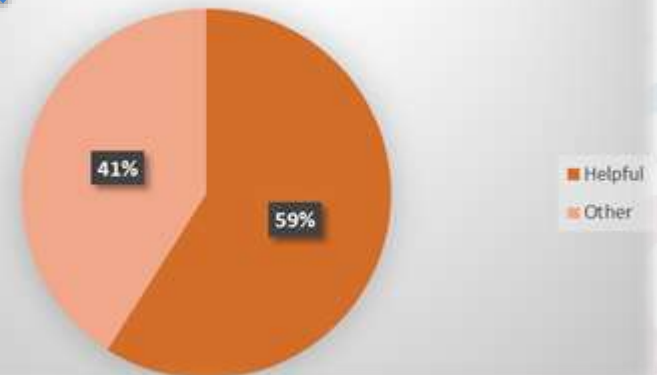
Overall Satisfaction

Did we provide a meaningful, well-structured and managed volunteer opportunity for project managers and nonprofit clients?

PROJECT COACHES

- **92%** of respondents felt like they **made a meaningful contribution** to their assigned nonprofit client.
- 97% of respondents said they'd **recommend C2A to a friend**, colleague or fellow PMI chapter member.
- **100%** said they **intend to participate in more pro bono service.**

NONPROFITS

- **82%** were either "extremely" or "very" **satisfied** with their overall Coach2Action experience
- **70%** of respondents would be **interested in participating** in a similar project again

The Score

Testing the premise that 40 hours of virtual professional support, in under 90 days, effectively and measurably improves project design for NPs

- Improved project design
  - Improved likelihood of delivery on time
  - Identified areas for Skills Based Volunteer support
- Identified ideal PM support for NPO projects
  - Virtual, paired method
  - Can be implemented in the future for other aspects of the PM discipline
- Enhanced NP Business Practice
  - NPs should **identify (understand)** techniques that will help them in the future
  - NPs will find the discipline helpful and want to implement it themselves

Track Sponsored by: JPMORGAN CHASE & CO.

Conclusion

- We can enhance the ability of mature nonprofits to increase their use of skill-based volunteers through the application of project management discipline that defines the scope and work of projects to a level that allows the definition of volunteer staffing plans or position description.

- The amount of project management support needed to achieve this dramatic increase in volunteer potential was less than 40 hours (one work week) per project.

- The 70/30 ratio indicates that we can dramatically increase capacity for skills-based volunteerism **more than two-fold** with the application of a minimum amount of professional PM practices.

Conclusion

- We can enhance the ability of mature nonprofits to increase their use of skill-based volunteers through the application of project management discipline that defines the scope and work of projects to a level that allows the definition of volunteer staffing plans or position description.

- The amount of project management support needed to achieve this dramatic increase in volunteer potential was less than 40 hours (one work week) per project.

- The 70/30 ratio indicates that we can dramatically increase capacity for skills-based volunteerism **more than two-fold** with the application of a minimum amount of professional PM practices.

Conclusion

- ## It WORKS

- ## In 40 hours

- ## Doubled Output

But Wait…

- Project Management is the mechanism to deliver change.

- Projects are INVESTMENTS

- PMs manage resources to deliver an outcome that:

  - is valuable

  - value > cost (positive Return on Investment (ROI)

What's your measure?

Track Sponsored by: JPMORGAN CHASE & CO.

What's in a PM?

- **Change agents** who work well under pressure and are comfortable with change and complexity in dynamic environments.
- **Value oriented:** "big picture" and the small-but-crucial detail oriented…and know when to concentrate on each.
- **Organized**, passionate and goal-oriented
- **People skills** needed to develop trust and communication
- **Flexible toolkit of techniques**, resolving complex, interdependent activities into tasks and sub-tasks that are documented, monitored and controlled.
- **Always improve:** lessons-learned reviews

Track Sponsored by: JPMORGAN CHASE & CO.

CHANGE AGENTS
delivering
VALUE

Track Sponsored by: JPMorgan Chase & Co.

Maximizing Success Through Project Management

- Get things done (completion matters)
- Know what you want (requirements)
- Understand what "value" is for you
  - Mission, Financial
- Expect projects (temporary endeavors) to return more value than the cost (positive ROI)
- Pay attention (Executive Focus)
  - get them managed
  - have an accountability mechanism
  - **Know how to count value**

Track Sponsored by: JPMORGAN CHASE & CO.

Getting to a PM

- PMI: Local chapter of the Project Management Institute (PMI.org)
- Corporations: they all have PMs
- Points of Light: Georgia Gillette, Senior Vice President for Programs, GGillette@pointsoflight.org
- Me: Kendall.lott@mpoweredstrategies.com
- PM Point of View podcast:
  - pmiwdc.org/pm-pov
  - iTunes under PMIWDC

Track Sponsored by: JPMORGAN CHASE & CO.