



CONFERENCE ON VOLUNTEERING AND SERVICE

**JUNE 27-29, 2016**

Points of Light \* HandsOn Network \* generationOn \* Corporate Institute \* AmeriCorps Alums

Convened by:



Co-Title Sponsors:

JPMORGAN CHASE & CO.



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)

Track Sponsored by: JPMORGAN CHASE & CO.

# 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.

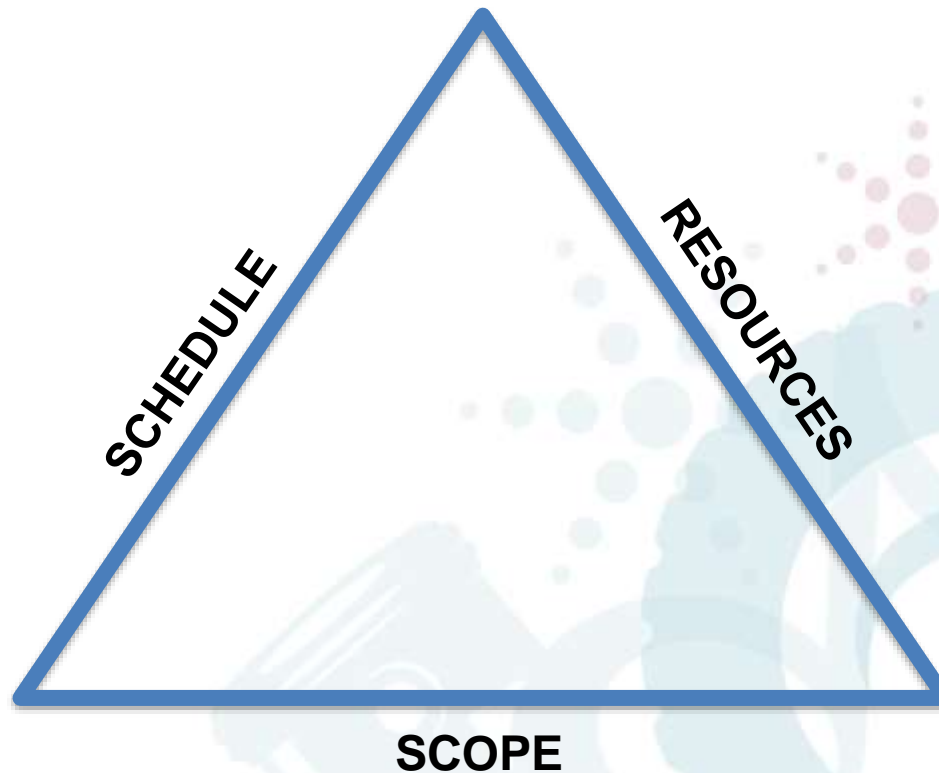
# 10 Knowledge Areas

**Integration**  
**Scope**  
**Time**  
**Cost**  
**Quality**

**Human Resources**  
**Communication**  
**Risk**  
**Procurement**  
**Stakeholders**

Track Sponsored by: JPMORGAN CHASE & CO.

# Triple Constraint

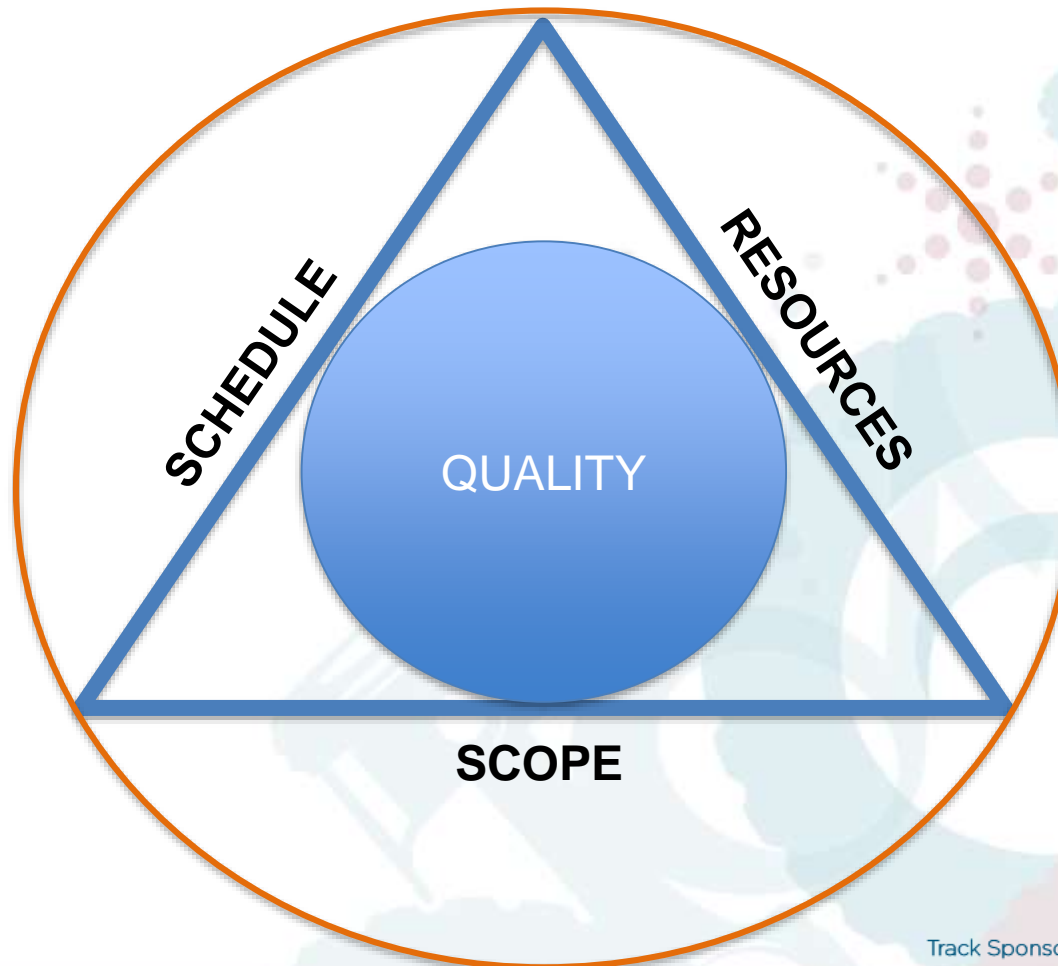


Track Sponsored by: JPMORGAN CHASE & CO.



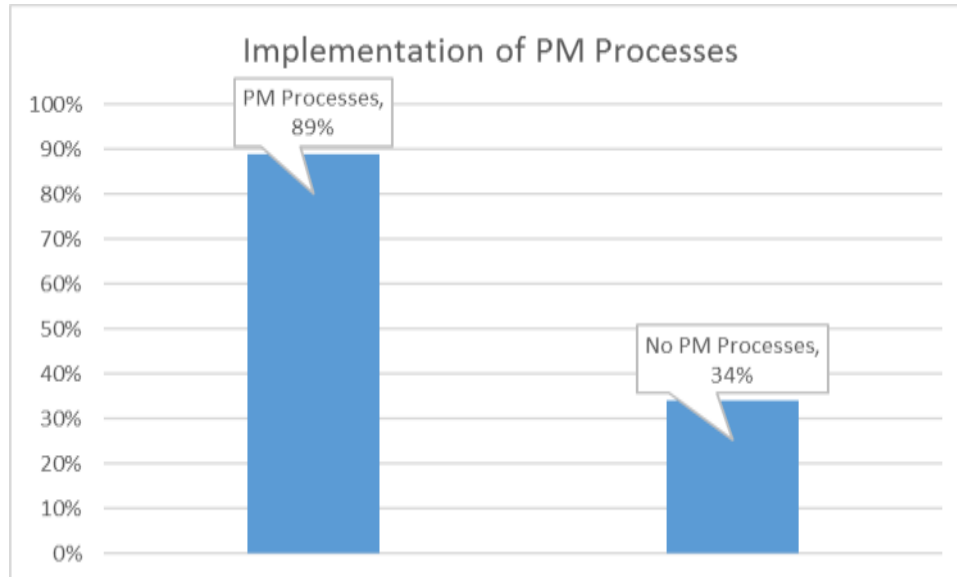
# The Five Part Triple Constraint

STAKEHOLDER EXPECTATIONS

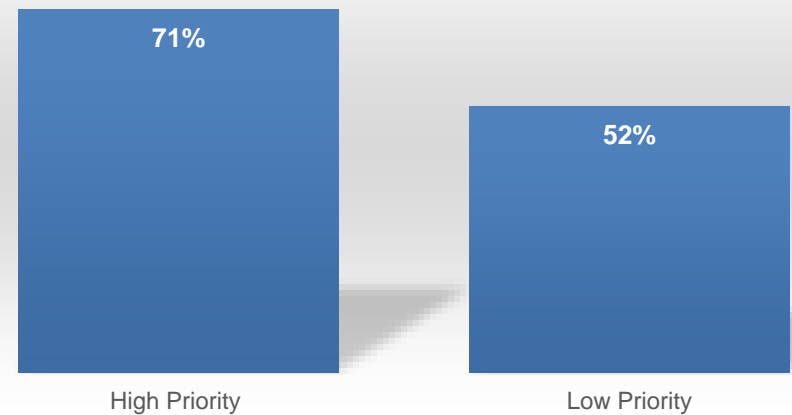


Track Sponsored by: JPMORGAN CHASE & CO.

# What do you get?



## Organizations with PM Culture



(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

Track Sponsored by: JPMORGAN CHASE & CO.

# 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

Track Sponsored by: JPMORGAN CHASE & CO.

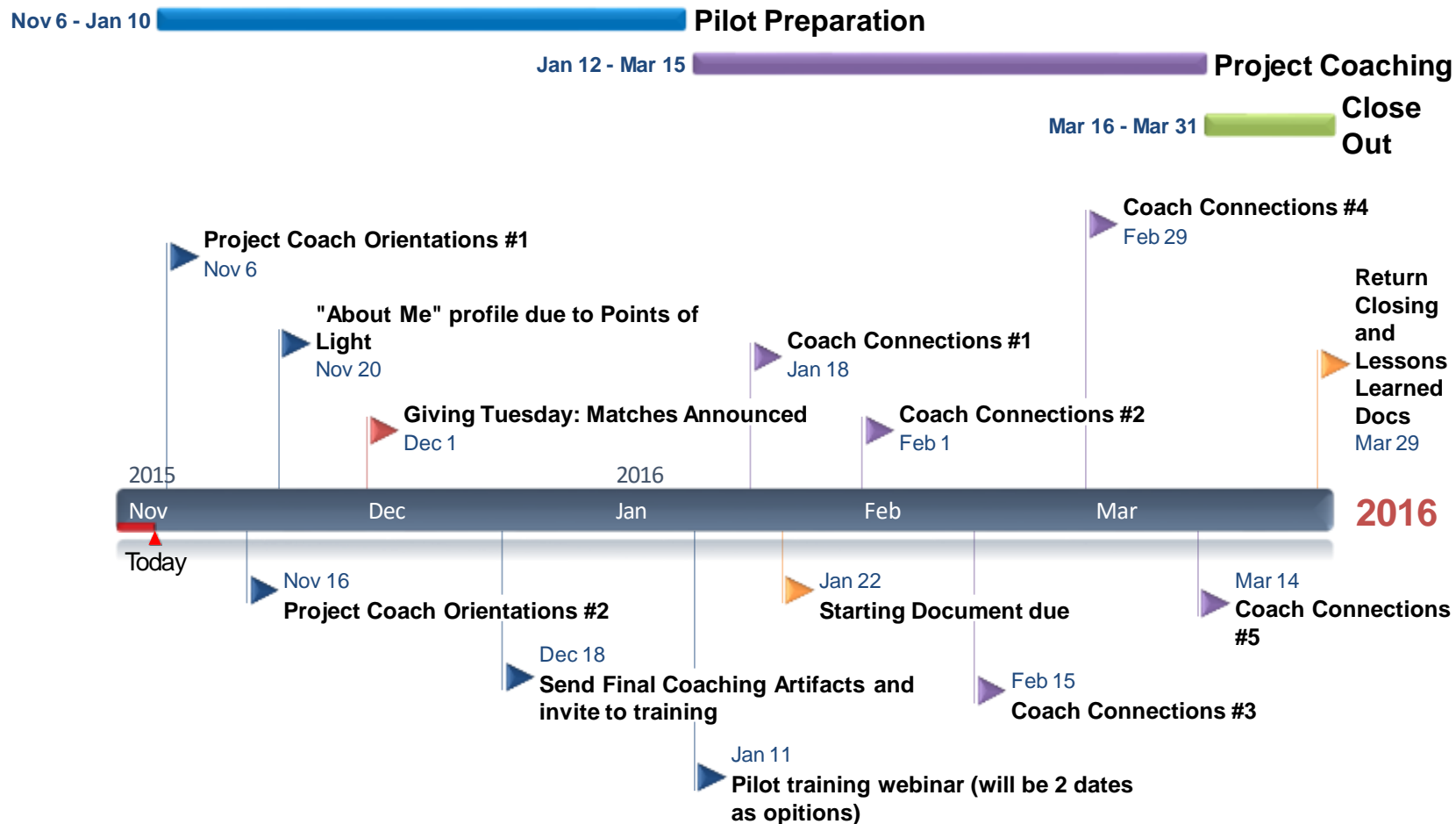
# It's a pilot for a reason

*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



Track Sponsored by: JPMORGAN CHASE & CO.

# Key Pilot Milestones

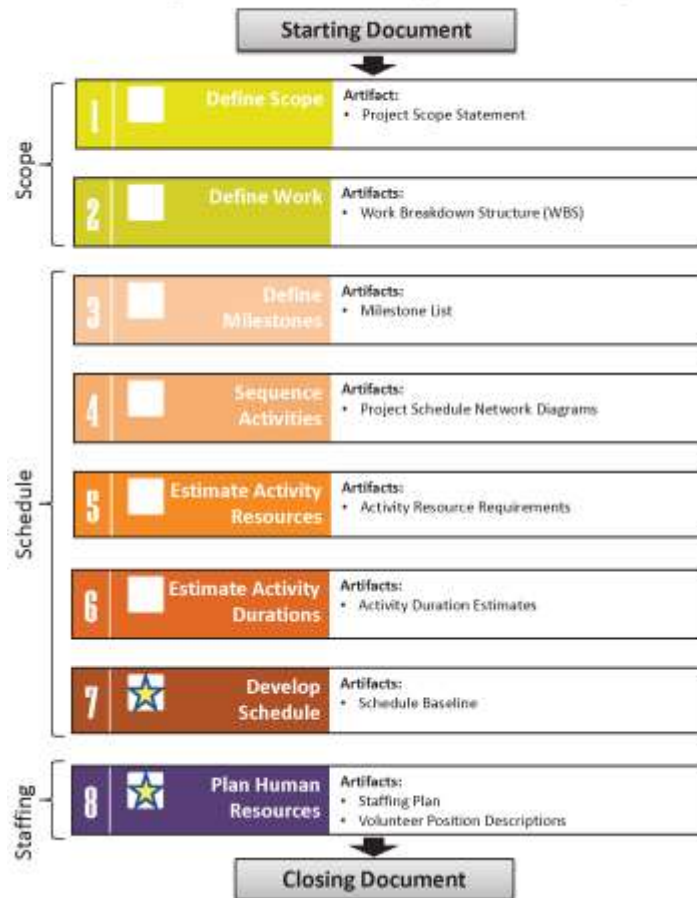
- Designed Pilot, scope/schedule/staffing
- Developed Milestone Roadmap and related artifact templates
- Set up Project Management repository for schedules and documentation for the pilot and from the projects
- Registered 30 NPs
- Developed PM Coach recruiting info and launched to PMI Chapters
- Presented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

Track Sponsored by: JPMORGAN CHASE & CO.

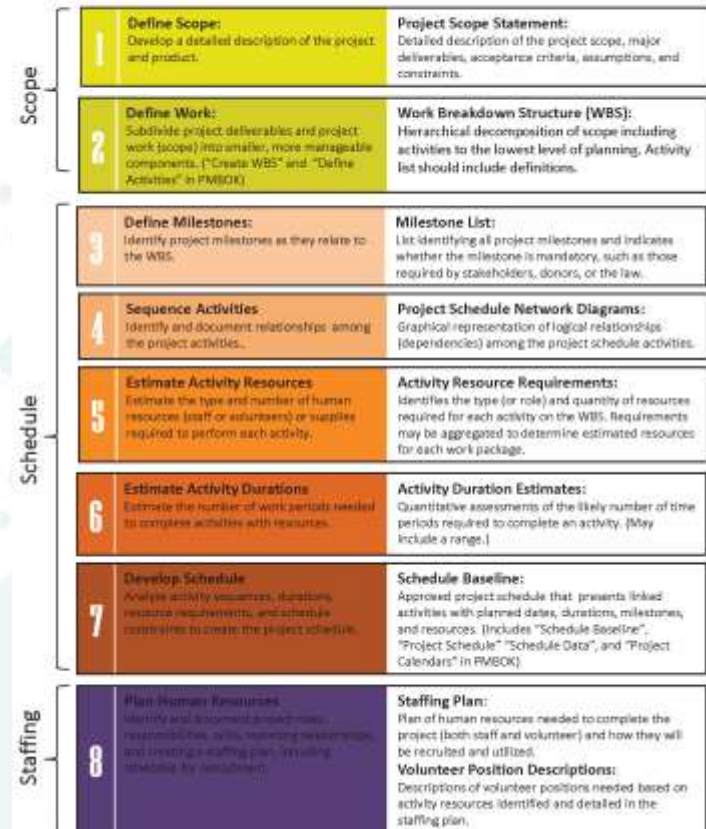


# Project Maturity Roadmap

## Project Maturity Roadmap



## Project Maturity Roadmap Descriptions



Track Sponsored by: JPMORGAN CHASE & CO.



# Starting Document


**POINTS OF LIGHT** **Coach2Action**

## Starting Document

The Starting Document is intended to be an agreement between the pro-bono project coaches and Non-Profit Organization (NPO) regarding the terms of the Coach2Action engagement. The Document describes the NPO project, lists key individuals of the project coaching team, identifies stages of the project maturity roadmap that will be addressed, and identifies artifacts to be produced.

The Project Maturity Roadmap provides the framework and methodology for the C2A program. The Roadmap should be completed prior to the Starting Document in order to populate specific sections, and submitted as an attachment with the signed Document.

**A. General Information**

<b>Project Title</b>	Coach2Action Maturity Project: <i>Insert name of NPO project</i>		
<b>NPO Name</b>			
<b>Brief C2A Project Description</b>	<i>Ex. The C2A project team will move the NPO project from maturity phase X to maturity phase Y in order to establish a plan for achieving the NPO project objectives.</i>		
<b>Period of Performance</b>	January 12, 2016 – March 15, 2016; 20 hours of project coaching		
<b>Prepared By</b>			
<b>Date</b>		<b>Version</b>	

**B. Points of Contact and Signatories**

**Non-Profit Organization Contact(s):** Provides overall direction of project and oversees project's goals and objectives. Engages in coaching sessions and actively participates towards milestone and artifact completion.

Name	Email / Phone	Role	Signature
		Primary POC	

**Project Managers:** Leads the planning and development of the project; manages the project to ensure timely progress along the Project Maturity Roadmap; and actively participates towards milestone and artifact completion.

Name	Email / Phone	Role	Signature
		Project Coach #1	
		Project Coach #2	

[Home / About](#) | [Resources / Download](#) | [Accessibility](#) | [Electronic Donation](#) | [About Our Mission](#)

1001 Wilson Street, 4th Floor, Suite 100, Chicago, IL 60607  
 312.461.0100 ext. 200 • 1001 Wilson Street • Chicago, IL 60607  
 1001 Wilson Street, Suite 100, Chicago, IL 60607 • 312.461.0100

[www.pointsoflight.org](http://www.pointsoflight.org)


**POINTS OF LIGHT** **Coach2Action**

**C. NPO Project Objectives**

**D. NPO Project Current State**

**E. C2A Project Maturity Deliverables**

Put an x next to the deliverables that will be completed during the engagement:

- ☐ Define Scope (Artifact: Project Scope Statement)
- ☐ Define Work (Artifact: Work Breakdown Structure)
- ☐ Define Milestones (Artifact: Milestone List)
- ☐ Sequence Activities (Artifact: Project Schedule Network Diagram)
- ☐ Estimate Activity Resources (Artifact: Activity Resource Requirements)
- ☐ Estimate Activity Durations (Artifact: Activity Duration Estimates)
- ☐ Develop Schedule (Artifact: Schedule Baseline)
- ☐ Plan Human Resources (Artifact: Staffing Plan)
- ☐ Plan Human Resources (Artifact: Volunteer Position Descriptions)

**F. Coaching Milestones**

Milestone (Key Dates)	Related Project Artifacts	Date
Approved Starting Document	Starting Document	
Schedule Baseline	Project Scope Statement Work Breakdown Structure Milestone List Project Schedule Network Diagram Activity Resource Requirements Activity Duration Estimates	
Staffing Plan	Schedule Baseline Activity Resource Requirements	
Volunteer Position Descriptions	Staffing Plan Activity Resource Requirements	
Approved Closing Document	Closing Document	


[Home / About](#) | [Resources / Download](#) | [Accessibility](#) | [Electronic Donation](#) | [About Our Mission](#)

1001 Wilson Street, 4th Floor, Suite 100, Chicago, IL 60607  
 312.461.0100 ext. 200 • 1001 Wilson Street • Chicago, IL 60607  
 1001 Wilson Street, Suite 100, Chicago, IL 60607 • 312.461.0100

[www.pointsoflight.org](http://www.pointsoflight.org)

Track Sponsored by: JPMORGAN CHASE &amp; CO.

# Closing Document



POINTS OF LIGHT

**Coach2Action**

**Closing Document**

The Closing Document is an agreement between the project coaches and Non-Profit Organization (NPO) upon the activities and artifacts completed during the coaching engagement and signifies the acceptance and of the artifacts by the NPO.

**A. General Information**


<b>Project Title:</b>	Coach2Action Maturity Project: <i>Insert name of NPO project</i>
<b>NPO Name</b>	
<b>Brief C2A Project Description:</b>	<i>Ex: The C2A project team will move the NPO project from maturity phase X to maturity phase Y in order to establish a plan for achieving the NPO project objectives.</i>
<b>Period of Performance</b>	January 12, 2016 – March 15, 2016; 20 hours of project coaching
<b>Prepared By:</b>	
<b>Date:</b>	<b>Version:</b>

**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 NPO 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 Step	Artifact
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1) Define Scope	Project Scope Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2) Define Work	Work Breakdown Structure
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3) Define Milestones	Milestone List
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4) Sequence Activities	Project Schedule Network Diagram
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5) Estimate Activity Resources	Activity Resource Requirements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6) Estimate Activity Durations	Activity Duration Estimates
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7) Develop Schedule	Schedule Baseline
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8) Plan Human Resources	Staffing Plan
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9) Plan Human Resources	Volunteer Position Descriptions



POINTS OF LIGHT

**Coach2Action**

Leave any comments in the box below regarding the status of deliverables that may not have been completed in entirety, and a summary of the discussion with the NPO on next steps to complete them if necessary.


**C. Signatures**

The signatures of the individuals below indicate that the deliverables indicated in this document accurately represent the accomplishments and outputs of the C2A coaching engagement. This also indicates that the NPO accepts the artifacts created during the course of the engagement.

Non-Profit Organization:		
Name	Signature	Date

Project Coaches:		
Name	Signature	Date

**Attachment A: Project Maturity Roadmap**



POINTS OF LIGHT

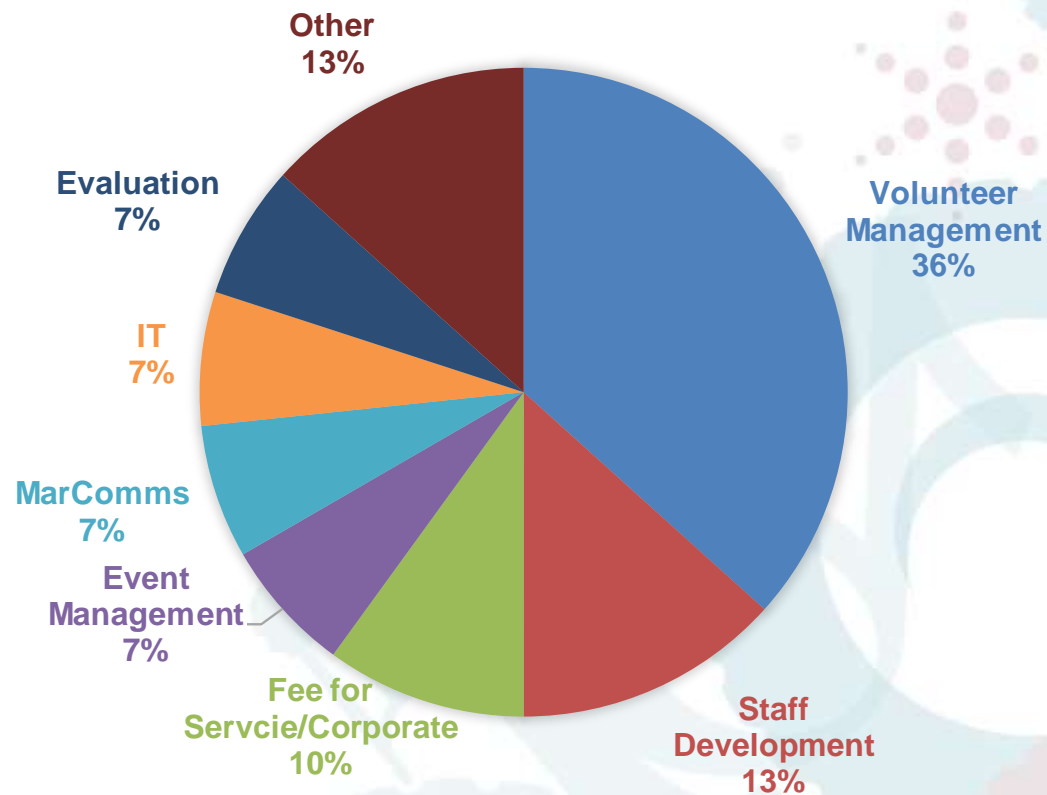
**Coach2Action**

www.pointsoflight.org

Track Sponsored by: JPMORGAN CHASE &amp; CO.

# Project Types

## TYPES OF CAPACITY-BUILDING PROJECTS



Track Sponsored by: JPMORGAN CHASE & CO.

# Minnesota Children's Museum

## A. General Information

<b>Project Title:</b>	Coach2Action Maturity Project: <i>Minnesota Children's Museum strategic plan for increasing volunteer engagement and utilization in the new museum</i>		
<b>NPO Name</b>	Minnesota Children's Museum		
<b>Brief C2A Project Description:</b>	The C2A Action Team will support and assist MCM to achieve their goals and strategies based on their Action Plan		
<b>Period of Performance</b>	January 12, 2016 – March 15, 2016; 20 hours of project coaching		
<b>Prepared By:</b>	Heidi Jaeger, Joseph Costello, Kate Errickson		
<b>Date:</b>	March 9, 2016	<b>Version:</b>	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
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1) Define Scope	Project Scope Statement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2) Define Work	Work Breakdown Structure
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3) Define Milestones	Milestone List
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4) Sequence Activities	Project Schedule Network Diagram
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5) Estimate Activity Resources	Activity Resource Requirements
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6) Estimate Activity Durations	Activity Duration Estimates
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7) Develop Schedule	Schedule Baseline
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8) Plan Human Resources	Staffing Plan
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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: <i>Streamlining Volunteer Onboarding Process</i>		
NPO Name	WHW		
Brief C2A Project Description:	<i>Create a process to streamline the volunteer onboarding process by implementing the volunteer Salesforce application; create training; update policies and procedures.</i>		
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
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1) Define Scope	Project Scope Statement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2) Define Work	Work Breakdown Structure
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3) Define Milestones	Milestone List
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4) Sequence Activities	Project Schedule Network Diagram
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5) Estimate Activity Resources	Activity Resource Requirements
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6) Estimate Activity Durations	Activity Duration Estimates
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	7) Develop Schedule	Schedule Baseline
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8) Plan Human Resources	Staffing Plan
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	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

<b>Project Title:</b>	Coach2Action Maturity Project: CVNL Redesigning Corporate Volunteer Program		
<b>NPO Name</b>	Center for Volunteer & Nonprofit Leadership		
<b>Brief C2A Project Description:</b>	Coaches will help CVNL to better address nonprofit volunteer needs, by clarifying the program to engage more corporate partners and increase revenue. The consulting focuses on four primary areas.		
<b>Period of Performance</b>	January 12, 2016 – March 15, 2016; 20 hours of project coaching		
<b>Prepared By:</b>	Anton, Edna, and Gaylene		
<b>Date:</b>	03/08/2016	<b>Version:</b>	

- Survey Design
- Pricing Model
- Competitor Analysis

## 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
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	1) Define Scope	Project Scope Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2) Define Work	Work Breakdown Structure
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	3) Define Milestones	Milestone List
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4) Sequence Activities	Project Schedule Network Diagram
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5) Estimate Activity Resources	Activity Resource Requirements
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6) Estimate Activity Durations	Activity Duration Estimates
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7) Develop Schedule	Schedule Baseline
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8) Plan Human Resources	Staffing Plan
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8) Plan Human Resources	Volunteer Position Descriptions

Track Sponsored by: JPMORGAN CHASE & CO.



# Catherine McAuley Center

## A. General Information

<b>Project Title:</b>	Coach2Action Maturity Project: Olympic Fundraiser Event		
<b>NPO Name:</b>	Catherine McAuley Center (CMC)		
<b>Brief CZA Project Description:</b>	The Center is adding a third fundraising event in August 2016 with an Olympics theme (to coincide with the Summer 2016 Olympics in Rio de Janeiro August 5-21). The purpose is to "create funds and friends" by asking people who are already closely affiliated with CMC to host Olympic-themed parties. Desired outcome is to raise awareness about CMC and its work in the community.		
<b>Period of Performance:</b>	January 12, 2016 – March 15, 2016; 20 hours of project coaching		
<b>Prepared By:</b>	Marcia Gross / Mary Jane Quandt		
<b>Date:</b>	March 8, 2016	<b>Version:</b>	1

## B. CZA 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
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1) Define Scope	Project Scope Statement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2) Define Work	Work Breakdown Structure
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3) Define Milestones	Milestone List
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4) Sequence Activities	Project Schedule Network Diagram
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5) Estimate Activity Resources	Activity Resource Requirements
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6) Estimate Activity Durations	Activity Duration Estimates
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7) Develop Schedule	Schedule Baseline
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8) Plan Human Resources	Staffing Plan
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9) Plan Human Resources	Volunteer Position Descriptions

- 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

<b>Project Title:</b>	Coach2Action Maturity Project: Enhancing the volunteer onboarding process		
<b>NPO Name</b>	Goochland Free Clinic and Family Services		
<b>Brief C2A Project Description:</b>	The C2A project team will develop a plan for Goochland Free Clinic and Family Services to effectively manage the volunteering onboarding process.		
<b>Period of Performance</b>	January 12, 2016 – March 15, 2016; 20 hours of project coaching		
<b>Prepared By:</b>	Laura Marotta, Chidananda Sukur		
<b>Date:</b>	3/11/2016	<b>Version:</b>	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
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1) Define Scope	Project Scope Statement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2) Define Work	Work Breakdown Structure
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3) Define Milestones	Milestone List
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4) Sequence Activities	Project Schedule Network Diagram
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5) Estimate Activity Resources	Activity Resource Requirements
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6) Estimate Activity Durations	Activity Duration Estimates
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7) Develop Schedule	Schedule Baseline
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8) Plan Human Resources	Staffing Plan
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	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

Track Sponsored by: JPMORGAN CHASE & CO.

# HandsOn Greater Phoenix

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

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

Track Sponsored by: JPMORGAN CHASE & CO.

# Pilot Outcomes

30 Nonprofits

60 Project Managers

1,200+ Volunteer Hours

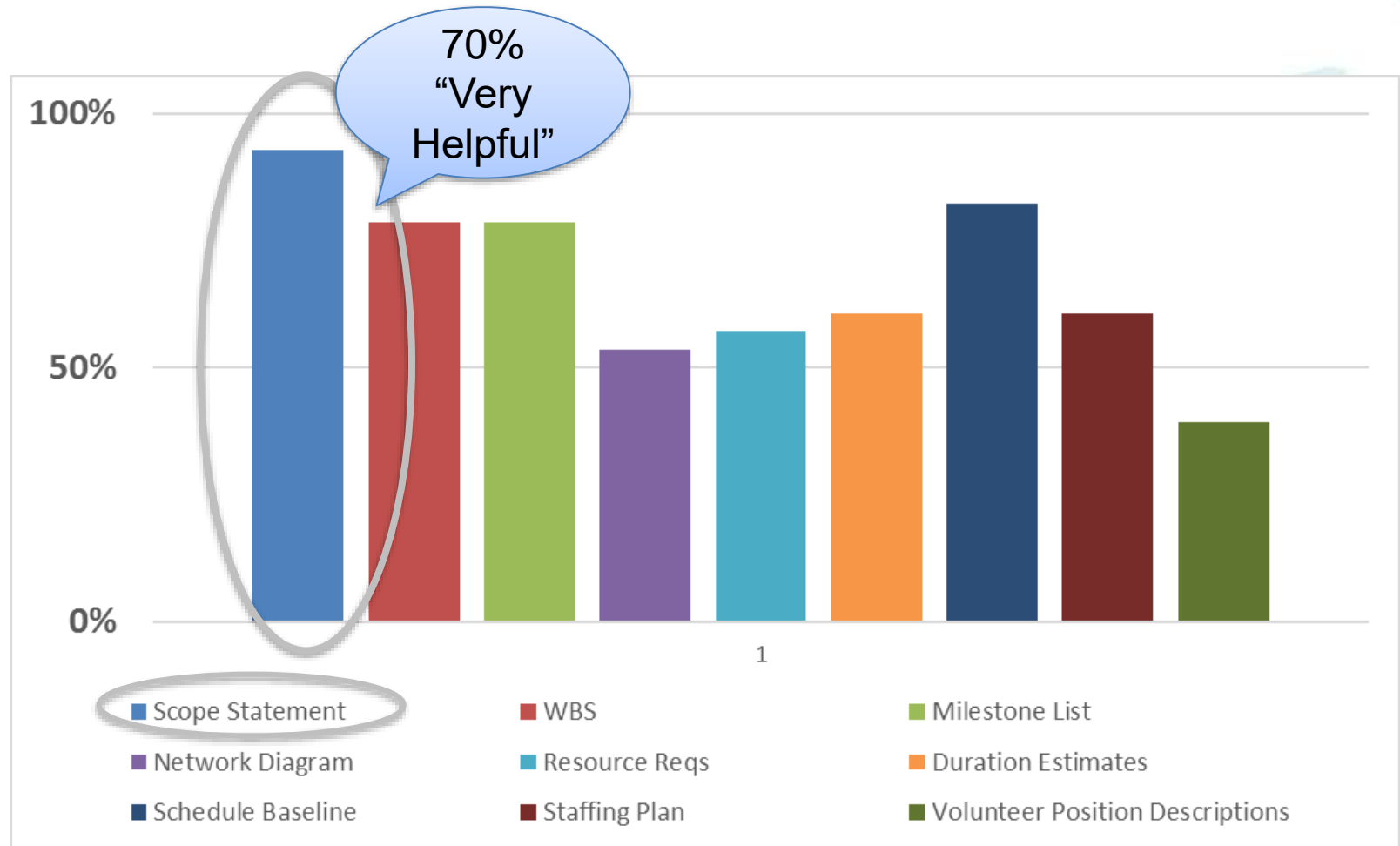
Organizations created plans that collectively will engage almost 1,600 Volunteers\*

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

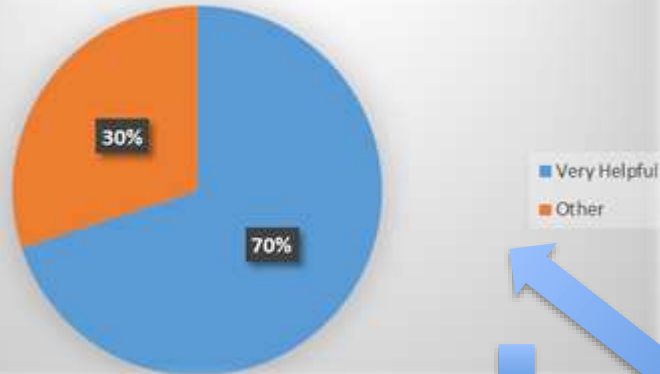


Track Sponsored by: JPMORGAN CHASE & CO.

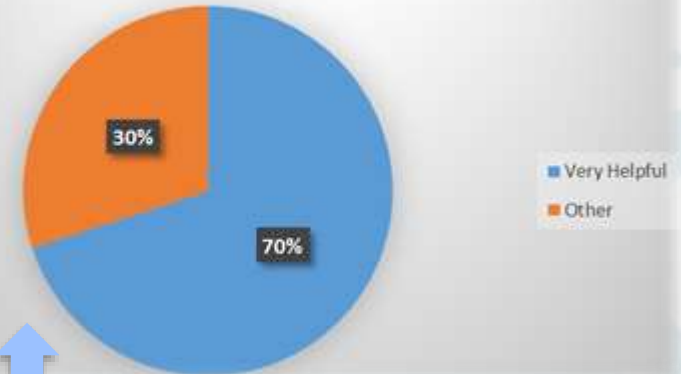


# Non Profit Perspective

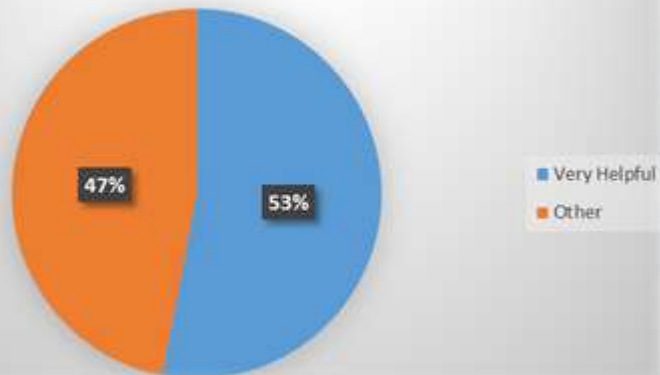
Project Deliverables



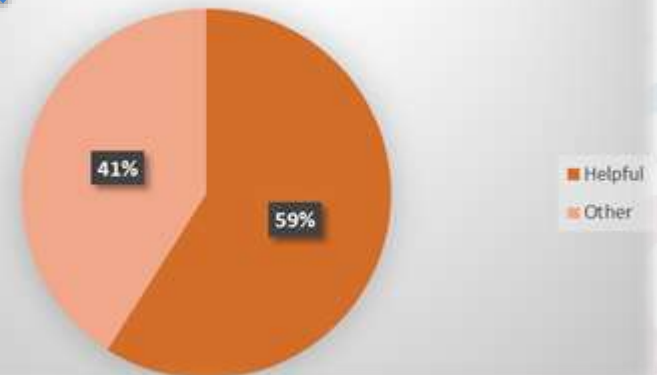
Schedule/Timeline



Project Objectives



Project Activities



Track Sponsored by: JPMORGAN CHASE & CO.



# 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

Track Sponsored by: JPMORGAN CHASE & CO.

# 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

TBD

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.

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.

Track Sponsored by: JPMORGAN CHASE & CO.

# Conclusion

- It WORKS
- In 40 hours
- Doubled Output

Track Sponsored by: JPMORGAN CHASE & CO.



# 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](mailto:GGillette@pointsoflight.org)
- Me: [Kendall.lott@mpoweredstrategies.com](mailto:Kendall.lott@mpoweredstrategies.com)
- PM Point of View podcast:
  - [pmiwdc.org/pm-pov](http://pmiwdc.org/pm-pov)
  - iTunes under PMIWDC

Track Sponsored by: JPMORGAN CHASE & CO.