May 15, 2019

Notes from Peer Affiliate Call #3 -- Overseeing a volunteer consultant workforce - tips, tricks and challenges

Moderator: Craig Kowalski
Notes: Darlyne Koretos

Attendees: Connie Hinitz, Jody Yetzer, Vickie Ciotti, Cincinnati; Darlyne Koretos, Michael Towers, New York; Julie Crockford, Miles Robinson , Boston; Franci Hart , Dinky Hemmam, Central Oklahoma; Vickie Ciotti; Vicky Foxworthy, Julia Fisher, ESC LA; Susan Loucks, Pittsburgh; Jim Rather, Houston

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1. Project assignment - the art of matching consultant skills with client needs

- managing expectations, of the client and of the consultant team
- addressing a consultant mismatch mid-project
- ensuring consultant commitment, and
- dealing with unexpected changes from client after project start

Vicky/LA

We do match meetings for large projects to align on scope. We manage engagement expectations by listing what consultants can expect of clients and vice versa. We do a deep and thorough intake of all our new volunteers. Also, If we have a consultant that's an expert on the subject of the project we might ask that person to join the meeting.

We have 2-3 perspective consultants plus a staff member attend the meeting. If a consultant isn't interested in working with the client they can opt out. They rarely do because they do a lot of research before the meeting.

Craig

In Cincinnati a project manager is in the meeting.

Jim/Houston:

I am the manager for all the projects. I will assign a consultant for the project. I will call the client first and then call the consultant. The consultant (project manager) will go out and price the project and scope out. Project manager has lots of responsibility. Pricing is determined by client's budget – sliding scale. $500K and above might have up to three consultants. Pricing is based on 40 hour week. I like to give new people exposure by pairing them with an experienced consultant.

Julie/Boston

I just want to emphasize how much of an art matching is. We have a comprehensive onboarding process. We do numerous phone screens; some in person. The volunteer goes through orientation and several courses. We set expectations during this process so they understand when they're on a project. They understand the client wants a committed person on the project. Then we do an initial call to see what kind of help the client thinks they want. After that, we engage a volunteer consultant pool – use data base info – and then gauge interest and availability. Once they get that done they relay to them – set up engagement with contract – meeting between client and team. Cients get to know consultants and vice versa. A lot of pre-work getting consultant ready to be on the project. A lot of front work. It's more of an art than a science. Easier to engage consultants that have been with them a while. Newer ones require more hand holding.

Craig

We like to have at least one experienced person and one learning the ropes on projects.

Susan/Pittsburgh:

We have consultants who may have in depth experience in niches but not broad-based experience. Want to bee able to find places for as many people as possible. Does anyone else deal with this? Carving out spaces for people.

Craig

At least half of Cincinnati people are project leads. They don't get called on that often.

Vicky/LA

We do have requests for the specialist skills. We keep them on the list and it just depends on what project comes up. What is the main barrier to using the specialists, Susan?

Susan:

They come in as an expert. They're not broad based. We try to find a place for them.

Vicky/LA

That all happens in the vetting onboarding process. We try to assess there whether they have enough skills to be of value to us. Once they're in we use them. We try to head that one off at the pass.

Connie/Cincinnati

The new volunteers we bring on have a range of opportunities. The average hours any volunteer puts in is anywhere from one to 500 hours a year. We tell the volunteer If they're looking for consistently staying active they should also look elsewhere to more opportunities. Some have skills that help enhance internal needs. Some are not as sharp as they used to be. It's a real conundrum matching skills to needs. I don't have all the answers.

Craig
What do you do with a consultant that's not working out on a project?

One week before project started he resigned. Put another consultant in. Something happened with him and he wanted to get out. Client was not happy. Let the consultant go.

Vicky/LA
Midpoint checkins 25
% and 75% that way we can catch things. We catch things but not only. Sometimes call the clienet or call consultant to try to get a handle. Had an honest conversation with the consultant and brought another person in.
Sometimes it's one consultant having problems with another consultant. Remind everyone what's expected of them. It happens very rarely.

Vickie – Cincinnati
What happens when a consultant just doesn't have it anymore?

Susan:
I haven't faced that but my incrasing sense of folks we get in are less interested in developing themselves than coming in and being "awesome" for the client.

Vicky/LA
We have an emeritis status. It's very tough. We have been having lunch with consultants we're not sure about and try to assess their level of skills. Not the right time for you; try to honor them. At least 3x year we ask who do we need to emeritize?

Julie:
Coming up for us a lot too. Sometimes the consultant says something that takes you aback. What do you do with those consultants? Do you list them as a consultant and just not use them?

Vicky/LA
We don't list them on the annual report.

Julie:
Sometimes they're donors and we list them as donors.

Julia Fisher –
Sometimes the consultant notices and says "hey, you're not using me."

Vicky
Should we include them in luncheons? We don't invite them to volunteer luncheons.

Julie Fisher
Our annual celebration of services luncheon we do invite them but they don't know they're emeritus status. We probably have 100 in that category.

Vicky
David Factor met with the consultants one-on-one to provide some dignity. We send a letter which says "thank you for your service."

Cincinnati:

Connie/Cincinnati

We do an annual review of the member roster and if someone has not been active during the year we contact them to find out why they haven't been active. We don't really have emeritus status. Some may work as little as one hr a year but they're still part of the workforce.

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2. Tackling the difficult conversations

- with the consultant (e.g., performance, constructive criticism, relaying feedback, removal from project); and
- with the client (managing expectations, responding to problems in team, scope, schedule)

Craig

What about from the client side? What if they're not getting what they deserve?

Julie/Boston

We live on our reputation. It's the most important part of the job. Be a listener and be a buffer between the client and the consultant. We work through it. In fact, we had a situation with a repeat client like that. We ended up putting together a 121 slide presentation as the final report to make sure the client was satisfied. The client needed to feel there was a reset happening even though the consultant didn't feel like there was one.

Craig:

Do you do addendums?

Julie/Miles

Yes. We had one meeting that didn't go well – like oil and water. Once we got feedback we put a new team in there. In another case the client went 180 degrees from what the agreement was. We then coached consultant in how to move forward with the client. We're doing an addendum now on consultant and client side. Our consultants are volunteers. Most of the times we don't have these problems, but if push comes to shove they feel they don't have to stay. It's the soft skills that will allow you to move forward with or without an addendum. No formula with dealing with these issues.

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3. Managing Consultant Capacity vs Client Demand:

- Keeping the consultant bench engaged and ready when called upon
- Determining trends in client services needed, to ensure roster of consultants capable and available to meet needs as they surface , and
- planning recruitment to fill gaps and forecasted expertise required

Craig

We have certain projects that are standard but do you have any way of anticipating what kinds of projects are going to come in?

Susan:

Yvonne will put out something on the volunteer site she uses that says they're looking for specific skills.

Craig:

How does she know what to look for?

Susan:

We have cohorts moving through that's a prescribed process so we knew what to recruit for.

Vicky/LA

We created a combination of staff and consultants – started as a task force to diversify – race, ethnicity, geographic considerations. We were able to diversify quite a bit. We only bring people on once maybe twice a year so we're able to be proactive on our recruiting. Meagan, who handles our volunteers, uses social media to talk about the kinds of skills they're looking for.

Vicky/LA

They have a discussion with Megan Mahoney who handles volunteers. If they find a person that she thinks would make a good volunteer they are invited to a meeting to develop the skills at the information workshop. We invite some of the people who come through the information workshop to apply. Not everyone is invited to apply. Then they go out to coffee or lunch with a consultant in the new person's area of expertise. If that person feels they're a good recruit they are invited to join. If we feel that our bench is not strong enough we may invite in another cohort group.

Darlyne

I used LinkedIn to invite specific people from group to join. I joined a specific group where we wanted certain skills (i.e., accounting, HR, etc.) I then posted a (free) notice that appealed to a few people interested in giving back in their area and gave contact information. Worked well.

Vickie/Cincinnati

Does anyone else over exaggerate their skills? Do you have people volunteer who say they're experts and they're really not?

Julie/Boston

Maybe pair them with a volunteer who is an expert in that area. Would that help?

Craig:

We try to observe them during training sessions.

Susan:

We try to give them a low risk project at first and ease them in to larger projects.