COMMUNITY ACTION PARTNERS

HBSAB's Community Action Partners:

A Guide for Volunteers

Harvard Business School Association of Boston

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Welcome to the Harvard Business School

Community Action Partners

The Harvard Business School Community Action Partners (CAP) was founded in Boston in 1993 to bring together Harvard Business School ("HBS") alumni and local nonprofit organizations in volunteer consulting projects. The mission of the Community Action Partners is to:

- Serve the Boston community by providing free business consulting to nonprofit organizations; and
- Serve Harvard Business School alumni in the Boston area by providing opportunities for them to channel their interests into community service.

Since its start up, over 800 HBS alumni (and Harvard Kennedy School alumni since 2004) have worked on Community Action Partners projects for 154 diverse nonprofit organizations including museums, performing arts, social services and community development agencies. We welcome you to the group and hope that you will find, as we did, that you can give back to the community, use your valuable skills to help other organizations, and meet interesting people though volunteering with the Community Action Partners.

The Community Action Partners is associated with the Harvard Business School Association of Boston (HBSAB), the local HBS alumni club, and is funded by the club and through private and business donations. The Community Action Partners is governed by a Board of approximately 12-16 members who actively recruit new nonprofit consulting projects, oversee projects in process, and ensure that the Community Action Partners continues to fulfill its stated mission. A board member will act as a liaison to your project, organizing the initial meeting with the client, helping structure the project, and offering subject matter expertise and connections to other resources.

The Community Action Partners consulting projects are initially identified through recommendations from local HBS alumni, other contacts of the Community Action Partners board, and general word-of-mouth. The board evaluates potential projects for viability, location, and fit with alumni interests and expertise. Potential clients must be Boston area nonprofit organizations with IRS 501(c) (3) nonprofit status, a Board of Directors, and at least 5 full-time paid employees. Project criteria include assignments that deal with business related issues such as strategic planning, organizational development, finance or marketing. Projects are scaled so as to be completed by a team of 4-6 volunteer consultants within a 5-8 month time frame. The Community Action Partners will not involve itself with efforts in fund raising, political campaigns, or religious organizations. We select about 15-20 projects a year, and advertise them to HBS alumni through HBSAB mailings and CAP emails. We then match up the selected projects with volunteering alumni. Once the teams are in place, kickoff meetings are set to get the projects going.

This handbook is intended to help you start an assignment and summarizes best practices identified by the Community Action Partners in its nonprofit consulting projects to date.[1] We have attempted to highlight some of the significant differences between working with nonprofit and with corporate organizations. If you have questions about working on a CAP project which are not addressed in the handbook, please contact your Board Liaison who is there to assist you.

Welcome to the Community Action Partners. We hope you have a fulfilling and enjoyable experience.

HBS Community Action Partners Board 2011-2012:

Gene Bonte, '74 (leave of absence)
Julia Clarkson, '98, Executive Director
Dennis Corcoran, '65
Steve Diamond, '70, Co-Chair
Barbara Fain, Harvard Kennedy School '87
Chuck French, '58
Anne Hayes, ‘90
Ken Hodge, ‘78
Barry Horwitz, '88
Karl Loos, '78 (leave of absence)
Bill Morrison, '98
Janet Nicholas, '80, Co-Chair
Dan Ross, '78
Dick Sayre, '73
Jon Shipp, '89
Everett Shorey, '77
Scott Taylor, '81
Diogo Teixeira, '82

[1] The Community Action Partners thanks the HBS Community Partners program in the Bay Area for generously allowing us to use portions of its volunteer guide.

How is Consulting to Nonprofits Different?

Business Savvy:

Unlike most for-profit businesses, most nonprofit organizations have few staff members with professional business experience or training. As a consultant, the Community Action Partners volunteer may need to understand that and introduce even simple business concepts to the client staff. For example, introducing rigorous data gathering and analysis to either confirm or rebut underlying assumptions or opinions is often important for making progress in these cases. These concepts may be considered elementary in the for-profit world, but are not necessarily well known or understood in the nonprofit world.

Dependence on Volunteers:

Unlike any for-profit business, most nonprofit organizations rely heavily on volunteers to perform many basic (and sometimes not so basic) tasks. Beyond the paid professional staff, the volunteer resources they rely on are like the assistance that we provide: available at the volunteer's convenience, not always consistent, and varying as the demands of the volunteer's paid work and home life change. In addition, the volunteers may not have the same level of qualification or education as someone performing a similar task in a for-profit business.

Different Priorities:

The priorities and timeframes of nonprofit organizations may be different from those of for-profit businesses, where priorities (such as profits) and timeframes are often clear cut.

Consulting Hours:

Many nonprofits are used to the "traditional volunteer" (such as a person not working full-time outside the home, a self-employed or independently wealthy individual) and may have to be educated about our availability and initially coaxed into meeting with The Community Action Partners team outside of normal business hours.

What is Consulting in General?

For those of you who do not have experience working as consultants, we thought we would try to summarize the basic tenants of consulting. Consulting is the process of identifying and defining a problem or an opportunity for a client, developing strategies and action plans to solve the problem or to capitalize on the opportunity, and advising the client on those strategies, action plans, and recommendations.

The process can involve several phases:

1) Identifying the initial problem / opportunity;
2) Gathering information from various sources (e.g. internal and external players, market surveys, competitive analysis, etc.);
3) Analyzing the information and drawing conclusions;
4) Redefining the problem or opportunity;
5) Developing proposals for action;
6) Recommending a plan of action; and,
7) Assisting in the implementation, if needed.

Characteristics of Successful Projects

a) The problems to be addressed should be well defined

It should be possible to complete a Community Action Partners project within 5-8 months. The Community Action Partners Board screens projects as best it can to ensure they are "doable," however the project team is ultimately responsible for reassessing and agreeing on the project definition with the client. Priorities may have changed since the client wrote the application and the presenting problem may not be the root cause.

b) The Board of Directors and Executive Director should be committed to the project

The Community Action Partners project should have visibility to the Board and/or senior members of the organization and is usually only started after receiving their approval. Projects can often involve a change in the organization and successful change is likely only with support from the top.

c) The Team Leader should be identified early in the process

Our experience shows that projects with a Team Leader who takes active control of running the project, setting up meetings, and ensuring everyone understands and agrees with the project scope and plan, are more successful. It is critical to establish momentum in order to complete a project within the specified time frame.

Getting Started

The Community Action Partners volunteer consultant should:

a) Gather basic information, through interviews or written material about the nonprofit organization:

- What is the organization's size (operating budget or revenues, paid staff members, volunteers, etc.);
- What kind of organizational structure does it have;
- How long has the organization been active;
- What are its mission and guiding objectives;
- Who are its target audiences;
- What are its primary funding sources; and
- Who is on its Board of Directors (or Trustees) and how are they selected?

b) Request copies of:

- Annual reports (to the Board, funding agencies, members etc.);
- Annual budgets and business plans;
- Brochures of services and programs offered; and
- any other published materials

c) Understand with whom and how the organization competes - for its audience, for its funding and for its service provisioning.

d) Fully understand the nature of the project, why it was requested and what end-product the client expects.

e) Prepare an Engagement Letter, typically written by the Board Liaison or Team Leader in conjunction with the team, to specify the project scope and duration. The Team Leader should review the Engagement Letter and work plan with the client to ensure that both the client and the team agree on the work to be done. The Engagement Letter should also specify the project deliverables, who will be doing each step of the work plan, what the client will contribute to the project, and the targeted project completion date.

f) Establish the primary client contact. It is best if this person has decision-making authority.

Managing the Process

Once you have agreed with the client on the nature and the scope of the project, you should develop a fairly detailed work plan which includes:

- What tasks must be accomplished;
- How long each task will take;
- Who is responsible for each task (e.g. team member, client staff member, Board Liaison);
- The agreed upon deadlines and the deliverables for each task; and
- How often progress will be reviewed by the team and the client.

Our experience tells us that gaining early momentum is key. The team should meet soon after the project scope is defined, and set some quick milestones to get the project moving along.

As the project progresses, the Team Leader should coordinate the process by keeping in regular contact with the team members, the client, and the Board Liaison. Meetings should be scheduled at regular intervals, and phone or e-mail contact kept in between meetings.

Team members should discuss any delays or other problems which occur with the Team Leader as early as possible. This includes changes in how much time each volunteer can commit to the project as well as client-driven changes. If the project scope seems to be changing or expanding from the initial project scope described in the Engagement Letter, the Team Leader should discuss this with the Board Liaison. Together they will either revise the Engagement Letter, if the team agrees to the revised scope, or bring the clients' expectations back in line with the original plan. Follow-on phases can be undertaken as separate projects, but it is important for both the client and the volunteers to stick to the agreed upon project and complete it successfully.

Concluding the Process

The project team will present the results of the consulting project to the client contact and, usually, to a wider audience within the nonprofit organization and its Board of Directors. The Board Liaison should send a copy of the final product(s) to the Community Action Partners' Executive Director. The Team Leader should write a closing letter to the client

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Selected On-line Resources:

- **America's Charities** - www.charities.org - A workplace fundraising service for national charitable organizations
- **Council on Foundations** - www.cof.org - A nonprofit membership association of grantmaking foundations and corporations
- **Environmental Organizations On-Line** - www.envirolink.org - On-line international community of environmental organizations
- **Foundation Center** - www.fdncenter.org - Serves the information needs of grant seekers and grant makers. Includes on-line library with links to nonprofit resources
- **Global Impact -** www.charity.org - Represents over 50 humanitarian relief and development charities in giving campaigns
- **Guidestar** - www.guidestar.org – Information (sometimes outdated) on the programs and finances of nonprofits
- **Impact Online** - www.impactonline.org - Offers matching service for volunteers and nonprofits
- **InterAction** - www.interaction.org - Coalition of humanitarian organizations working worldwide
- **Idealist** - www.idealist.org – Community and information for donors and volunteers including publications and data about organizations and the nonprofit sector
- **National Charities Information Bureau Standards** - www.give.org - Rates charitable organizations and provides guidance to donors on making informed giving decisions
- **Philanthropy Journal On-line** - www.philanthropy-journal.org - Current news source for the nonprofit community. Includes articles, publications and job listings.

Also:

Harvard Business Review – www.hbsp.harvard.edu **-** Access to the catalog of articles, case studies and books on nonprofits offered by HBS Publishing.