Nonprofit Leadership and Management Program
Applied Projects Student Handbook

January 2015

University of San Diego
SCHOOL OF LEADERSHIP AND EDUCATION SCIENCES
Institute for Nonprofit Education and Research

BACKGROUND

This handbook was updated in January 2015 and is based on the following contributors:

Institute for Nonprofit Education and Research

- Nonprofit Leadership and Management Students
    - Applied Projects Guidebook for Students – Originally created March 2010 with a revision in March 2013
- Pat Libby, Professor of Practice and Director
- Program Assessment Committee
- Faculty

Caster Family Center for Nonprofit and Philanthropic Research

- Applied Projects Organizational Impact Reports
    - August 2009, June 2011, August 2013
- Applied Projects Evaluation: Qualitative Case Studies Report - October 2014
- Mary Jo Schumann, Ph.D., Associate Director
- Crystal Trull, M.A., Research Assistant

In collaboration with the *University of San Diego School of Leadership and Education Sciences*

TABLE OF CONTENTS

INTRODUCTION

Dear Students:

You have embarked on an important journey by enrolling in the Nonprofit Leadership and Management Master's Program at the University of San Diego.

What makes the program unique is our emphasis on applied learning. Since 2002 our students have completed nearly 1,000 applied projects for a wide array of nonprofit and philanthropic organizations. The best of these projects have been posted on our nationally recognized online Best Practice Library (Best Practices link).

During the course of your studies, you will complete approximately eight consulting projects a.k.a. applied projects, for a variety of nonprofit organizations. These projects might, for example, find you to revising or developing a set of bylaws, board manual, marketing plan, feasibility study for a strategic plan, fundraising case statement, etc. Most projects will be completed by teams of students. You and your teammates will select to work on projects for your own organization, a team member's organization, or in some cases, a nonprofit organization that has submitted a Request for Proposal for a project (this last category may include paying clients, and is one way you can contribute to our scholarship fund).

In 2010, a group of students developed an Applied Projects Manual as a way to share their insights for successfully working with teams and clients on applied projects. The manual has been expanded and refined over the years with input from successive student groups and faculty that have reflected on their own experiences as well as data from several quantitative and qualitative studies of applied projects that have been conducted by the Caster Family Center for Nonprofit and Philanthropic Research. This latest handbook represents our best thinking and most current research on the subject.

We hope you will utilize the tips and important lessons contained within this handbook to enhance your applied project process.

Good luck!

Pat Libby
Professor of Practice and Director
Institute for Nonprofit Education and Research

PROJECT ESSENTIALS

Working as a consultant for a client organization requires professionalism, organization, and flexibility. It is critical to remember that you are not only representing yourself (and possibly your own organization), but that you are also representing the University of San Diego and specifically, the Nonprofit MA program. The value of your degree will be enhanced by the continued stellar reputation of the program and the quality of the work that you and your team produce. Furthermore, your personal and professional reputation will be enhanced within the nonprofit community as a result of successful projects.

Because client organizations are not as intimately involved in the project as you and your teammates are, they can become easily confused about the process, the scope of services, expectations, and timelines.

Past feedback from client organizations indicates that communication, or the lack thereof, significantly impacted their experience.

Additionally, client organizations have expressed the need for frequent updates and lead-time to access organizational information or resources related to the project.

Therefore, communication, establishing team norms, planning, and creating timelines are critical elements to a successful project. Below are some helpful tips.

Communication and conduct

- Select one team member as the main point of contact between the student team and the client organization
    - The key contact person will coordinate meetings, provide updates, and answer client questions
    - Your team needs to consider the benefits and challenges if the contact is connected to the organization. It is recommended that the main contact not be affiliated with the client organization
- Communicate regularly with the client organization
    - Be sure the client and your team are clear about what you can and cannot accomplish during the project
    - Listen carefully to make sure that what the client organization wants and what your group can provide are one and the same
    - Be clear with the client organization about what you can and cannot accomplish within the scope of this project. Do not be afraid to say that a part of the work is beyond what this particular project entails
    - Meet face-to-face (either as a group or for individual tasks) no fewer than three times during the course of the project
    - Provide frequent updates at least every other week (or whatever is agreed upon with client) either via telephone or email, to keep communication lines open

  - Set a schedule of meetings with the client organization at the beginning of the relationship
  - Be sure to meet with multiple stakeholders affiliated with the client organization (e.g. the CEO and several board members)
- Communicate regularly with the professor
  - Ask if the professor wants to be included on any correspondence with the client organization
  - Arrange an informal meeting with the professor at least once during the semester to check in on the status of your project. Be sure to contact the professor quickly if guidance and direction is needed or if there are team dynamics or client issues that arise
  - Ask the professor to review and comment on the scope of services and final deliverables prior to sending them to the client organization
- Be on time to all client organization meetings (or, preferably, a few minutes early)
- Dress professionally and appropriately
- LISTEN carefully to what the client says both explicitly and implicitly. Your job is to provide the client organization with best practice research/information that will assist the organization in the most optimal manner.

Project considerations and time management

- Realize that these projects are a lot of work and do take time
  - Do not wait until the last minute; manage your time well
  - Schedule enough time for editing and making multiple revisions
  - Create a work plan with your team at the beginning of the project and re-evaluate the plan as you learn more about the client organization.
- Ensure that there is a consistent "voice" throughout the document to account for the differences in writing styles amongst the team (have one person or a team of people working together, edit the document).
- Determine the best final product format for the client (i.e., PowerPoint, manual, electronic resource, etc.)
- Give consideration to how to assemble the final product to meet course requirements as well as the needs of the client organization
- Be aware of the client organization's culture
  - Ensure your project outcome accurately reflects the needs of the client organization
  - To meet potential NPLM international requirements, cite specific readings if used

PROJECT START

How each team member interacts and participates in the project are also indicators of a successful project. At the beginning of the semester, students will choose their team members. Depending on the course, students may select to work with an organization where a team member works as staff or as a volunteer. Alternatively, the group may choose to work with an organization that does not have a student represented in the team or in the program. Most projects are carried out in teams of two to five people.

Over the course of the semester, teams generally meet once a week, usually face-to-face, in addition to group work that may be done via online platforms such as Google Docs. As mentioned previously, teams also meet with and provide updates to the client organization on a regular basis (every two weeks is recommended). Ideally, team members distribute the work evenly across the entire team, and each team member is in charge of a different aspect of the project (or work together collaboratively). At the end of the semester, student teams are asked to rank the relative participation of each team member as a way of conveying to the professor the amount of effort everyone contributed to the project. Your final grade will be based partially on this team member ranking.

Below are some suggestions for group selection and interaction.

Finding a team

- Consider schedules and communication formats
    - Day and time availability
    - Email, phone, work/home locations
- At the start of the project, everyone should state their individual learning objectives (e.g., "I would like to lead the team as a way of working on my project management skills") and incorporate these objectives into the team action plan
- Look for teammates with different areas of expertise
    - Allows for new perspectives and opportunities to think "outside the box"
- Consider personalities, compatibility, etc.
- Consider working with a different team each semester. It will enrich your learning experience!

Working with the team

- Manage expectations at the beginning of the project to avoid issues later
    - Discuss team member working styles
        - Some prefer to work incrementally (day by day), while others prefer to gather data and put everything together in one session
        - Have team members self-disclose their strengths and weaknesses
    - Divide work according to strengths (e.g., finance, program, communication, development) or as a way to develop new skills
- Create general operating rules for the group, as well as rules specific to the project

    - Do your fair share
    - Identify methods to hold everyone accountable
    - Decide how to resolve conflicts up front
    - Create a feedback method and use it (this is a leadership and management opportunity)
    - Encourage frank, open and ongoing discussions about how the team is functioning
- Use meeting times wisely and accomplish the tasks at hand
    - Honor time boundaries and, in particular, show up to team meetings on time
    - Always work from a meeting agenda
    - Discuss key findings, create direction, and assign tasks
    - Disseminate written meeting notes, paying special attention to action items, timelines, and assigning responsibilities
- Be aware that the group will go through a group development process such as the one developed by Bruce Tuckman[1]
    - If team dynamics become unusually difficult, speak with the professor as soon as possible
- Consider using the USD Applied Projects Team Contract (see Appendix A)

Developing a project timeline

When you first begin to meet as a group, it is important to create a mutually agreed upon project timeline. A sample timeline is included in this handbook (see Appendix B) and below are some helpful tips for establishing project timelines.

- Map out the project from start to finish to understand tasks and due dates
    - Refer to the syllabus for course deadlines related to project elements
    - Identify several meeting dates/times that work for the group to offer the client organization
- Be prepared to adapt and adjust the project timeline to meet project and client needs
    - Review your action plans, discuss lessons learned and adjust them regularly
- Identify a date for presentation to the client
    - **Do not present to the client organization until after the course has ended or until you have your professor's approval**

[1] http://www.chimaeraconsulting.com/tuckman.htm

SELECTING THE CLIENT ORGANIZATION

Prior to the first team meeting, each student should think about what kind of project they need for the class and if it would be a good fit for their respective organization. This will help in the team's selection of the client organization. The following section summarizes some advantages, challenges, and recommendations of working with your own organization, working with a team member's organization, and working with an organization where no USD students are affiliated.

Working with your own organization

Advantages

- Easier access to information
- Greater flexibility for student employee to work on the project because it is work-related
- A greater depth of organizational knowledge, resources, and opportunities
    - Useful insight and recommendations that is likely to be well received by the organization
- The opportunity to exercise leadership within student employee's organization
- The possibility that the student/employee will be recognized as part of his/her employee performance evaluation or in some other manner

Challenges

- Overcoming existing perceptions about student employee's skills
    - May need to establish a sense of expertise on the particular subject matter
    - May need to convince the organization of the benefits of the proposed project
- Lack of transparency from executive staff and/or board members depending on student employee's role within the organization
- Concerns about confidentiality and sharing "insider information"

Recommendations

- Have a cohort act as the key contact person for the organization
- Continually keep team members up-to-date regarding any internal information that pertains to the project
    - Be professional and only share relevant information
- Facilitate a "team presence" by allowing other team members to engage and interact with the client organization
- Be alert to your own biases and "baggage"
- Be open-minded to different approaches and feedback
- Be aware of the tendency to "let things slip" due to familiarity and easy access to client organization

Working with a team member's organization

Organizations benefit from having an outside perspective. Here are a few tips to consider when working as a team with a team member's organization.

- Maximize the student employee's inside knowledge and connections
    - Provides greater understanding about organizational culture, history, existing roadblocks or challenges, and personalities of stakeholders and key influencers
- Harness the value of an outside perspective from team members

Working with an organization with no team affiliation

At times, student teams may engage in projects with client organizations without an affiliation to any team member. Students have the opportunity to work with organizations that have contracted either with the Institute for Nonprofit Education and Research or the Caster Center. When working with a paying client, organizations have more incentive to meet deadlines and be more forthcoming with information, as well as expect a high degree of productivity and professionalism. In addition to the aforementioned recommendations, below are a few additional suggestions for working with an organization with no student affiliation.

- Establish communication immediately
    - Ensure the USD contact (generally, your course professor) has made initial introductions on behalf of the student team
- Be clear about the type of project the client organization is asking for
- Conduct some initial research about the organization to prepare you for the first meeting
- If difficulties arise, inform your professor immediately
- Be proactive
    - Realize there is no team "insider" to facilitate last minute access or "pull strings"
- Very important to be professional and "buttoned up"

WORKING WITH THE CLIENT ORGANIZATION

Preparing for the first meeting with the client organization

After the client organization is selected, it is important that the working relationship between the student consultant team and the organization is established very quickly. Below are some suggestions to successfully interact with the client organization.

- Complete the Client Letter (see Appendix C) and Scope of Services (see Appendix D) and forward to client representative in advance
- Schedule initial meeting with client representative(s)
    - Allow for at least one hour
- Always prepare an agenda in advance of each meeting
    - Send to client representative prior to the meeting
    - Include the purpose, anticipated attendee names and titles, and internal pieces needed (e.g., bylaws, program description, etc.)
    - Be clear about how much time will be necessary
    - Include any meeting logistics that the client should arrange (e.g., projector, conference room, etc.)

During the meeting

- Bring a copy of project documents to review
    - Class syllabus, client letter, Scope of Services, list of questions, proposed timeline
- Walk the client through the Scope of Services to clarify and agree upon project goals
    - Note any changes or clarifications
    - Review the timeline to ensure that it works for the client organization
    - Set dates for project needs. These can be changed if needed, but it establishes the importance of the project at the very beginning.
- Ask the client to help identify the key people you will need to interact with
- Come prepared with a list of questions to ask the client about the organization and project
- Listen carefully to what the client says and document these discussions in follow-up emails

After the meeting

- Debrief with your team within one week of the initial meeting
    - Make sure everyone has the same understanding of the client's expectations
    - Provide team members with feedback on their interaction with the client
    - Schedule dates that were not set during the meeting
- Follow up with client representative within one week after the initial meeting
    - Thank for time
    - Include a revised Scope of Services (if needed)
    - Provide a restatement of the project's purpose, as agreed upon during the meeting
    - Confirm next steps and timelines
- Schedule a meeting with the librarian as soon as possible – an invaluable resource

PROJECT COMPLETION

After the project is complete, there are several key steps to follow to ensure that the project results in a rewarding experience for both the client organization and the consultant team.

- Ensure accuracy
    - Final product should be free of typos and professional in appearance
    - Cite all sources
    - Maintain anonymity and confidentiality, as appropriate
    - Include email and telephone contact information for the student team members and the client organization
- **Do not present the project to client organization without your professor's approval**
    - Discuss, as a team, how to incorporate comments and feedback of final product before it is presented to client
    - Discuss the format of the presentation your team will make to the client organization
- Feedback and debrief with group
    - Discuss what worked well and what could have been changed
    - Be kind, honest, and encouraging about each member and their role in the project
- If the project is selected for inclusion in the Best Practice Library, be sure to address all of the recommendations and corrections made by your professor before submitting
- Estimate the dollar value of the in-kind service for the project

Post Project

Occasionally, some projects may require further work after the semester is over and students present their final projects to the client organization after the course has ended. Reasons for this include client organization board meeting schedules, special events, vacations, or other internal reasons. Below are some considerations in these circumstances.

- Be clear about the project timeline
- Be clear about the scope of work
- Recommend outside consultants to finish the work, if necessary
- If the team, or part of the team, decides to take on the extra work after the semester, inquire about an independent study arrangement with the professor
- Although the course has ended, incorporate the professor's comments and feedback into the final product BEFORE submitting to client organization (Note: this will also help you prepare the project for possible inclusion in your graduation portfolio).

NOTE: If the project must be extended because of student errors, delays, or unfinished work, then the students should complete the work as agreed upon (and without compensation or independent study).

APPENDICES

A. Team Contract

What is a team contract?
A team contract outlines the ground rules for a project team.

Who creates it, and why should you have a team contract?
The project team works together to create the team contract and then uses it to help team performance. Benefits include promoting buy-in, commitment, and common values as well as setting clear expectations and procedures for making decisions.

What goes into a team contract?
Team contracts should be customized to meet the needs of the project and the team. However, there are some general topics that should be covered, as follows:

- Code of Conduct
- Participation
- Communication
- Problem Solving
- Meeting Guidelines

TEAM CONTRACT SAMPLE

Our Project Team will work together to create the team contract and then use it to help team performance. Benefits include promoting buy-in, commitment, and common values, as well as setting clear expectations and procedures for making decisions, meeting deadlines, and producing high-quality work.

Code of Conduct
As a project team, we will:
1. Work proactively, anticipating potential problems and working to prevent them
2. Keep other team members informed of information related to the project
3. Focus on what is best for the whole project team
4. See the team project through to completion

Participation
We will:
1. Be honest and open during all project activities
2. Encourage diversity in team work
3. Provide the opportunity for equal participation
4. Be open to new approaches and consider new ideas
5. Have one discussion at a time
6. Let the team know well in advance if a team member has to miss a meeting or may have trouble meeting a deadline for a given task

Communication
We will:
1. Decide as a team on the best way to communicate various information
2. Focus on solving problems, not blaming people
3. Present ideas clearly and concisely
4. Meet and communicate frequently to discuss project progress
5. Arrange additional meetings, as needed
6. Keep discussions on track
7. Honor meeting timeframes
8. Read communications (emails, meeting minutes, action items, etc.) from each other
9. Respond to each other in a timely manner (i.e., within 24 hours)

Problem Solving
We will:
1. Encourage everyone to participate in solving problems
2. Only use constructive criticism
3. Strive to build on each other's ideas
4. Hold each other accountable for meeting the aforementioned standards

B. Sample Timeline for Employee Handbook Project

Task	1	2	3	4	5	6	7	8	9	10	11	12
Solicit employee handbooks from other organizations												
Review existing handbook												
Contact client organization												
Meet with Executive Director												
Meet with other key personnel												
Research employee handbooks												
Pick model for handbook												
Divide handbook into sections												
Summarize research												
Analyze/summarize client organization’s culture												
Submit rough draft to client												
Review corrections from client												
Compile final handbook												
Organize presentation												
Final project due												
Incorporate professor feedback and deliver product to client												
Final presentation to client												

C. Template Letter to Client Organization

Date

Name
Organization
Address
Address

RE: ***Name of project***

Dear ***Client organization contact if available and organization name,***

List the student(s) name(s)) is/are student(s) in the University of San Diego's graduate program in Nonprofit Leadership and Management (NPLM) enrolled in ***course name. He/she is/they are*** participating in a class that includes an applied learning component that requires ***them/her/him*** to develop a consulting relationship and professional product for a nonprofit or philanthropic organization. Applied-learning, as you may be aware, is a teaching method in which students actively engage the course material through community work. Students in the NPLM program have completed nearly 1,000 projects for San Diego area nonprofits and philanthropies. Our research shows that the majority of these projects are used by the organizations for which they were developed.

These students have agreed to create ***type of project*** for your organization. The project will entail ***list products*** and is expected to begin on ***date*** and end on ***date***. If the ***student(s) is/are*** not employed by your organization, we ask that you provide a brief orientation that includes an overview of your organization, your mission, your program(s), and the role of volunteers in your organization. This will help your organization and the ***student(s)*** involved in the project find a way to best meet the learning objectives of the course and your organization's goals.

We expect that organization representatives will meet frequently with the ***student(s)*** and provide access to the documents and personnel needed to successfully perform the assigned tasks and complete the project. Our students are full-time professionals currently working in the San Diego nonprofit community, and are dedicated to creating a product that contributes positively to the goals of your organization. ***He/she/they*** will provide you with a scope of services that outlines the project outcomes, expectations, deliverables, and timeline for your organization.

The Caster Center for Nonprofit and Philanthropic Research will follow up with you (or the person that was designated point of contact for the project), approximately four months after the project ends to encourage you to complete an evaluation of the impact and use of this applied-learning project on your organization. The NPLM program wants to express its appreciation to your organization for agreeing to engage in this project. We hope that this will be a mutually worthwhile learning experience for your, your organization, the students, and the University. Please don't hesitate to contact me if you have any questions about the project at ***phone #*** or ***email***.

Sincerely,
Name of Professor

D. Scope of Services

This template will assist the consultant team in creating a scope of services that outlines project goals, deliverables, timelines, and overall expectations. Each project will have its own unique criteria and it is recommended that the team determine the best approach for completing this document and pay attention to the document formatting when the information is finalized. This document is intended for the client organization.

University of San Diego Nonprofit Leadership and Management Program
Applied Projects Scope of Services

1. Overview of the Project and Goals:
This section provides a description of the project that includes:

- A brief description of the client organization, mission statement, etc. (based on prior research)
- A description of the project
- How the project idea was developed and determined to be a good fit
- How the organization was selected
    - Is one of the student members an employee of the organization?
    - Did the client organization approach USD?
- Goal(s) of the project
- Name of course and professor

SAMPLE DESCRIPTION: A student consultant team comprised of a team of # master's candidates in the Nonprofit Management and Leadership program at the University of San Diego has selected Organization X to produce a feasibility study report. Organization X has a mission to serve those in need in San Diego County. One of the student team members is an employee of Organization X and informed the team of the organization's desire to implement a new program.

The goal of the project is to (REFER TO SYLLABUS and list the purpose of the project based on what you will learn in class)

2. Outcomes and Deliverables:
This section describes the outcome and deliverables of the project that includes:

- An outline of what the client organization will receive at the end of the project
    - Analysis, conclusions, recommendations, implementation ideas, etc.
- A description of why and/or how the project will benefit the organization
    - Based on general benefits or specific needs of the organization

SAMPLE DESCRIPTION: After learning about Organization X and its desire to begin a new program, the feasibility study will benefit Organization X by providing useful and relevant data and information to establish the program. Additionally, at the conclusion of the project, the student team will provide Organization X with a feasibility plan that includes research results, recommendations, and actionable steps to ensure a successful program.

3. Process and Expectations:

This section identifies the specifics of how the student consultants will engage the client organization and expectations, including:

- Requirements of client organization
  - A list of anticipated items needed (i.e., organizational documents, access to relevant stakeholders (i.e., staff, board members, volunteers, donors), meeting space, email, phone introductions as needed, access to databases, etc.)
- A brief description of how the students will work together and with the client organization during the course of the project
  - Student consultant group representative contact info
  - Client organization representative contact info
  - Include timeline and meeting dates, if available
- Preferred communication methods (i.e., email, in-person, phone, or a combination of all three)
- A brief description of the methods the students will use during the project
  - Field research, interviews, database searches, etc.

SAMPLE DESCRIPTION: In order to complete the feasibility study, Organization X will need to supply the following organizational documents: (LIST HERE).

The student consultant team has selected (NAME OF PERSON/CONTACT INFO) to be the main point of contact on behalf of the student team who will interact primarily with (NAME OF ORGANIZATIONAL CONTACT) for project needs and updates. Communication will be primarily via (EMAIL/PHONE/BOTH).

4. Timetable:

This section includes a complete project timeline, with estimates for the amount of time required for each activity and who is responsible for that activity. Be sure to include check-ins and updates with the client organization. Include an estimate of the number of meetings with the client organization. Refer to the Timeline Appendix B, if necessary.

5. Other terms:

Student consultants will not at any time solicit, receive or control funds, assets, or property for charitable purposes, or employ, procure, or engage any compensated person to solicit, receive, or control funds, assets or property for charitable purposes. The client organization exercises control and approval over the content and volume of any funds, assets or property for charitable purposes.

6. Confidentiality: (*Do not alter this verbiage)*

Student consultants agree that any information received during the performance of this project will be treated in full confidence. Information will be discussed amongst the student consultant team, course professor and other classmates during the final presentation. This provision will remain in full force after the project terminates. If a client prefers to remain anonymous, the client will inform student consultants to this preference. Otherwise, student consultants will assume public disclosure of the name of the client organization is acceptable.

7. Cancellation of Any Part of the Agreement: (*Do not alter this verbiage)*

If either party is dissatisfied with the process or the results, student consultants can request the opportunity to address the issue(s). At any time, if either party chooses, the project may be terminated.

By signing this document, all parties have agreed to the terms as listed above.

____
Client Organization Contact Name Date
Client Organization Name
Client Organization Address
Client Organization Address

____
Student Consultant Name Date

____
Student Consultant Name Date

____
Student Consultant Name Date

____
Student Consultant Name Date

____
Student Consultant Name Date

E. Code of Ethics

University of San Diego
SCHOOL OF LEADERSHIP AND EDUCATION SCIENCES
Institute for Nonprofit Education and Research

Nonprofit Leadership and Management Program

CODE OF ETHICS

Our commitment to one another…

Respect: In all encounters safeguard information shared inside and outside the classroom and maintain professional and accountable working relationships

Earnestness: Exercise good intentions toward the production of high-quality work

Inquisitiveness: Responsibly pursue knowledge through inquiry and research

Collaboration: Acknowledge the systems and group dynamics in formal team settings, classroom discussion, and during individual research and reflection

Reflection: Consider experiences from the program and outside USD, to strengthen leadership awareness and capacity in practice and discussions

Authenticity: Ensure that work and commentary represent honest and productive contributions to the leadership and academic experience

Leadership: Use interactions throughout the program, to build upon leadership practices

Our commitment to the community…

Citizenship: Consider the best interests of USD and the program within personal, professional and academic settings

Excellence: Use best practices and high academic standards to guide work conducted for the nonprofit community

Our commitment to our client organizations…

Trust: Work with organizations in compliance with the law and ensure any conflicts of interest are disclosed to all appropriate parties

Expectations: Work closely to set and manage realistic expectations, outline scope of work and project timelines

Confidentiality: Ensure the safety and security of private, client information