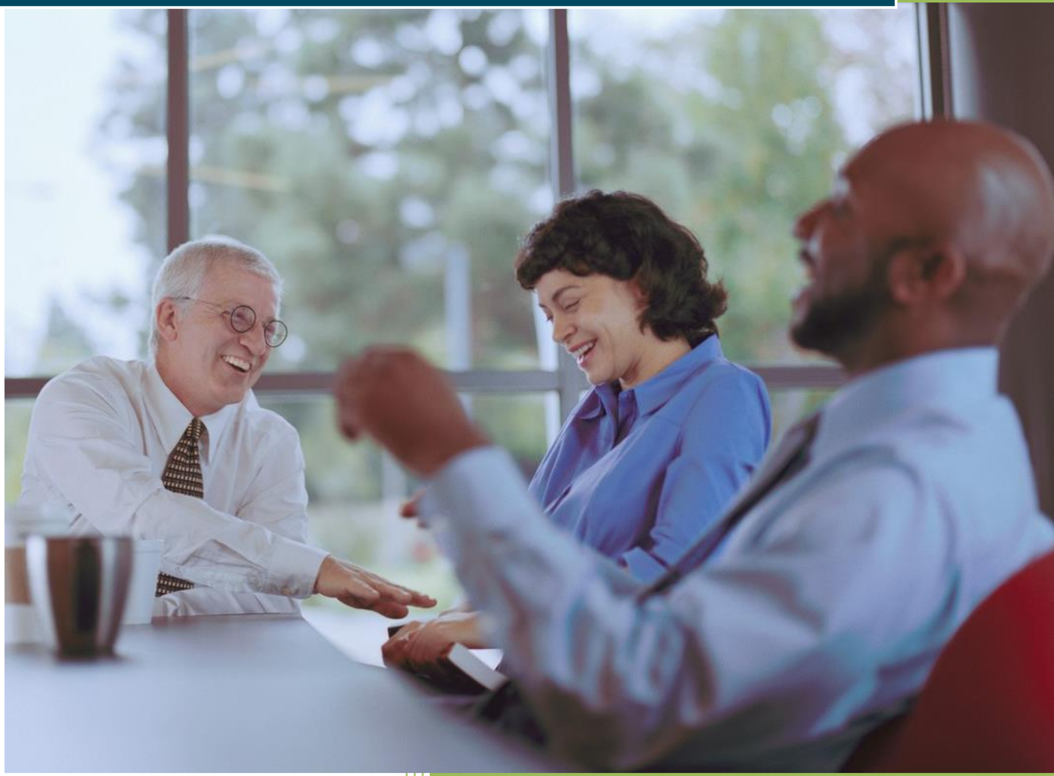
Executive Service Corps Guide for Coaches & Consultants

501 COMMONS



You make a living by what you earn.

You make a life by what you give.

– Winston Churchill

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Trust: The Precursor to Success

The experience and judgment you bring to your assignment are important determinants of your success as a consultant, trainer, or coach. However, good communication, showing respect for the individuals and the organization, and establishing trust are fundamental to the client's ability to use your expertise.

The following behaviors will make your volunteer experience a success.

1. Be a patient listener/learner and do not jump to conclusions.
2. Be honest about what you can do and by when you will have it done. Always do a little more than you promise.
3. Don't say anything to or about your clients that you wouldn't want passed around.
4. Speak the client's language. Don't force them to learn yours.
5. Pass your knowledge and experiences on to others. Share, coach and advance the abilities of others.
6. Respect the strengths and accomplishments of the organization.
7. Communicate with team members, 501 Commons, and the client more than you think is necessary.
8. Focus on the client's future results, not your past experiences or accomplishments.
9. Keep aware of the relationships and inter-dependencies between the project tasks. Ensure that what you're doing is what the client is paying for.
10. Keep learning and sharing new and better ways of getting things done.

Our evaluations incorporate many of these characteristics so that consultants and coaches are given feedback on their communications behaviors. What makes a person successful as a volunteer in the nonprofit sector are the same characteristics that make a person successful as a corporate executive, professional, or nonprofit manager.

Since 501 Commons consultants are often working with people of cultural backgrounds different from themselves and with organizations that are based in communities of color, the principles of culturally competent consulting are critical to our success. Please review this and refer back to this document when you are on an assignment where these skills and attitudes are particularly important.

You should feel very much at home at 501 Commons. Enjoy the work, take pride in it, and have fun with it every day!

Information about 501 Commons

Background and Purpose

501 Commons was founded in 1989 as the Executive Service Corps of Washington. The organization is affiliated with the Executive Service Corps United States (www.escus.org) .

The executive service corps program grew out of the International Executive Service Corps, which was founded by Frank Pace Jr., David Rockefeller, and others in the 1970s to share the experience and knowledge of the business sector with the educational and nonprofit world. ESC of Washington was launched as a result of a national search by The Boeing Company and other corporate leaders for the best means to support the nonprofit community. There are currently about 10 organizations using this highly effective approach to strengthening our nation's nonprofits.

In 2011, the organization changed its name to 501 Commons in recognition of the larger role and new ways it was serving nonprofits. The "501" part of our name refers to the nonprofit sector designation by the IRS. Most nonprofits are "501c3" organizations so the number has come to mean "nonprofit." The word "commons" refers to a concept deeply rooted in US history and law that describes a situation where people have access to, and responsibility for, shared assets and resources governed by a shared purpose with participation based on fairness and mutuality.

Consistent and accurate use of our name is essential to establishing and upholding our brand. The name is 501 Commons, and should be used fully in all formal communications, such as speeches, in print, or on the Web. Resist referring to the organization as "501" verbally and in writing.

Mission Statement

The mission of 501 Commons is to **amplify the strengths of nonprofits**—so people and communities flourish. The results we aim to produce are:

- Nonprofit leaders with the support they need to be effective
- Organizations that are able to improve, extend and sustain needed programs and services
- Nonprofits in Washington state that collaborate with each other and with government, business, and philanthropy to improve their communities

Values

501 Commons is intentionally broad in its services, which is also reflected in our organization's values.

The 501 Commons staff and Executive Service Corps members use an appreciative, assets-based approach to clients. Our goal is to meet clients where they are and help them get to where they want to be. In other words, there is no judgment as to which organizations deserve services and the goal is to be widely accessible to all nonprofits.

Our values include:

1. **Respect.** We build on the strengths of individual leaders and organizations, honoring the expertise and diverse perspectives of our clients, volunteers, supporters, partners, and community members.
2. **Integrity and transparency.** We encourage honest and open communications internally and externally.
3. **Inclusion.** We serve responsible organizations from diverse communities throughout the state, balancing the desire to be widely accessible to all with the need to steward limited resources and manage growth wisely.
4. **Accessibility.** We market a broad array of affordable services to diverse communities throughout the state, and leverage the talents of volunteers to ensure that nonprofits can access the support they need at a cost they can afford.
5. **Collaboration.** We promote teamwork within our organization, with our clients, and among nonprofits. We strive to collaborate and partner with nonprofit and philanthropic organizations,

schools, capacity building organizations, governments, and businesses that work to strengthen our communities.
6. **Results.** Our high-quality services respond to real client needs and reflect sound research. With our help, our clients become more sustainable organizations and more effective leaders.

Board of Directors

501 Commons has a volunteer board of directors, which uses the Policy Governance® approach to board governance. A Policy Governance® board develops policy statements that define how the board will operate, how the board will work with the executive, what limitations and requirements the board is placing on the executive and what long-term end results the organization is trying to achieve. This provides a systemic approach to governance that can be stably implemented.

Staff

A list and biographies of 501 Commons staff can be found on the website at [Our Staff]. The Executive Director is Nancy Long. 501 Commons frequently engages service corps members in program development and other internal projects.

Like all nonprofits we welcome the help of volunteers for events, and special administrative projects. Please let the staff know if you can provide hands-on volunteer help in the office or have ideas or areas of interest that will help our organization flourish.

Services and Clients

501 Commons provides expertise to nonprofits through 30+ services, including a full range of management and technology consulting; outsourced HR, accounting, database administrations, and IT infrastructure; professional development and board training; and free information and referral services.

Annually our services strengthen over 1000 nonprofits, improving the quality of life for individuals, families, and communities. In most years, about 1100 people benefit from training and peer learning opportunities. In addition, 1700 organizations participate in GiveBIG, which is produced by 501 Commons. Most years, Executive Service Corps members are engaged with about 250 organizations.

Our clients are nonprofit organizations and government —including schools and other educational organizations. Most organizations are designated as charitable or 501(c) (3) in the IRS code. While most organizations we serve are in western Washington but we serve the Pacific Northwest and provide services in about 15 states each year.

Changes Due to the Coronavirus

The organization has always used technology extensively to allow for meetings by telephone and video conferencing. This use has intensified due to the coronavirus. To protect the health of our volunteers and clients, we ask that you avoid being face-to-face engagements with clients, particularly indoors. 501 Commons staff can assist you in setting up technology to support your work on projects.

We have reduced programming during the pandemic, including learning sessions, networking gatherings, and cohort-based programs.

Client Fee Policy

Having the client make a financial investment in the consultation acknowledges the value of 501 Commons services and helps to ensure satisfactory follow-through. In some cases some of the program costs are paid by a grant. Fees also cover our volunteer program costs and the cost of 501 Commons staff who supervise all volunteer engagements and review all work products developed by volunteers.

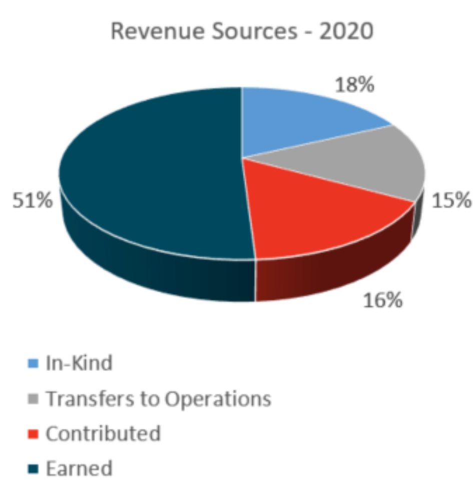
To make our services affordable to organizations of all sizes, we use a sliding scale fee for services that are provided by service corps members.

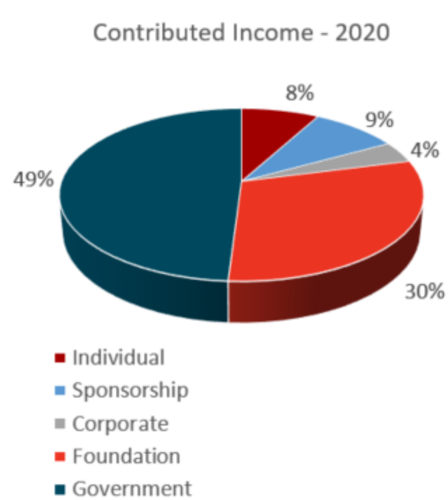
- The consulting fee is based on the hours of consultant/coach time needed. Generally, the minimum fee is $40/hour.
- Generally, a fixed price fee is established based on the client's operating budget and the number of hours projected to complete the project.

501 Commons staff determines the amount of the fee, prepares the agreement, and presents this to the client.

How 501 Commons is Funded

501 Commons has a cash budget of nearly $4.8 million. In-kind contributions – primarily the value of service corps and Volunteer Manager Corps time adds another $1.1 million, for an overall budget of $6.9 million.





Most of our earned income is from our “back office” services in IT Infrastructure, database management, human resources, and financial services.

Role of the 501 Commons Volunteer

Supporting 501 Commons

As a nonprofit ourselves, we are grateful that the support we receive from our philanthropic partners help us keep services affordable to nonprofits of all sizes. We encourage all volunteers to make a financial contribution to 501 Commons in addition to the contribution of your time and talents.

Requests for donations are sent to volunteers before GiveBIG and at the end of the year, but please talk with the staff if you would like to donate on a monthly basis, have stock or other property to donate, or would like to discuss including 501 Commons in your planned giving.

Time Commitment and Availability Notice

A typical consulting assignment might require you to work for 6-12 hours a month over a period of 3-6 months. Some projects last a year or more. You can schedule your work according to your availability and the client's needs and preferences but need to assure that the project is completed within the contract period. Coaching engagements generally require 60-90 minute meetings once or twice a month for six months. Including the time to document the coaching session, we expect a coaching engagement to require about 18 hours.

- If the project is going to take longer than expected, let your client and 501 Commons know.
- Notify the client, your team members, and 501 Commons staff if you will be out of town for **longer than a week.**

If unavoidable time conflicts arise or your situation changes so that the project schedule is disrupted, let the 501 Commons program manager you are working with know.

Conflicts of Interest

Occasionally coaches and consultants will be asked by clients to serve on the client's board of directors or to consider paid employment or a consulting contract with the client organization. If this occurs, you should feel complimented, as this is a testimony to the value of your service. In order to avoid any actual or perceived conflict of interest, however, do not accept board membership, a consulting contract or paid employment with an organization while you are serving as a 501 Commons volunteer with that organization. After you have completed the assignment, you should feel free to accept such offers. Please notify 501 Commons of any ongoing engagement with the organization.

To avoid any confusion in this area, we ask all coaches and consultants to read and sign a confidentiality and conflict of interest form. Please see Appendix A for a copy of this form.

Personal Liability

501 Commons carries a general liability coverage policy that provides coverage for professional services and consulting our volunteers provide to clients. There is no workers' compensation coverage for volunteers.

Client Confidentiality

All 501 Commons volunteers sign the confidentiality form included in Appendix A. This statement requires you to hold in confidence all information identified by the client or marked as "confidential." You should prompt your client to mark the documents they consider confidential.

In addition, you should use discretion in your conversations with people within the client organization and outside of the organization to assure that you are not sharing information that was given with the expectation that it would not be shared. Be careful not to share any private information you have learned from your work with the organization about specific staff or board members.

Recording Time and Expenses

501 Commons includes the value of hours contributed by coaches and consultants in our financial statements and reports to funding sources.

You are expected to keep track and report the time you spend on all aspects of a project. When you are on a project, you will receive a monthly email from one of our staff members asking for the hours worked. If you need help with your time tracking, we can provide a template for you to use. When recording time, you should include activities like preparatory work, research, and phone calls in addition to meetings or other forms of contact with the client. Travel time should not be counted.

501 Commons does not reimburse volunteers for project expenses. You are expected to cover the incidental costs of parking, coffee, copies, etc. If you keep records, your mileage and other expenses are tax-deductible to the full extent of the law.

If you have significant project expenses based on requests from your client, they can be charged back to the client under the contract. Notify the client in advance what you expect the expenses to be and submit the reimbursement request directly to the client unless there are reimbursements due to several consultants. In this case, submit the requests to 501 Commons and we will bill the client.

Resources for Volunteers

Professional Development

501 Commons hosts free workshops on nonprofit consulting called "Learn to Serve." Sessions we are doing for the public are also sometimes made available to service corps members at no cost. Let us know if you are interested in attending a session produced by 501 Commons.

Social/Peer Networking

501 Commons maintains a private LinkedIn group, which features job postings, event reminders, and a discussion board for members.

We host quarterly 501 Connects events. These are late-afternoon gatherings with light appetizers, perfect for getting to know other volunteers and learning about client projects.

Annual Awards & Appreciation Event

Each year 501 Commons recognizes volunteers who have made a special impact through their service to the community. Awards include:

- The John Pehrson Award – for consultants who go "above and beyond" in contributing their time and knowledge.
- The Willie Austin Award – for consultants who have provided outstanding service to a new or emerging nonprofit.
- The Legacy Award – for consultants who have created an exemplary tool, template, or report that can be used as a model for other projects.

- The Coach Award – for coaches who have modeled best practices and earned high client satisfaction scores.
- The New Member Award - for a consultant or consultant pair that joined the service corps within the last two years and has demonstreated service excellence.
- Action Learning Consultant/Team Award- for a consulting pair or individual consultant that demonstrated excellence in performing their duties in guiding a client to successful completion of an action learning project or assignment that was completed during the year just ended.

Project Resources & Tools

501 Commons staff can help you identify tools, templates and materials that may be valuable to you. There are many resources listed on our public site. You can also visit the volunteer resources page and the Member Resource Center. You may be prompted for a user name and password for some materials. The username is "volunteer" and the password is "washington," Both username and password must be entered in lowercase letters.

The Leader Newsletter

You will receive an online newsletter each month with information about new members, volunteer opportunities, and events sponsored by 501 Commons or other organizations. (If you are not getting the newsletter check your junk mail folder and mark the email as "not junk". Contact Tim@501commons.org for assistance.)

For Consultants

Role and Responsibilities

Your role is as an advisor to the top management and/or the board of directors of the nonprofit organization. It is likely that you will work closely with the executive director and the board of directors. You are there to supplement, but not to supplant, the staff of the organization by diagnosing problems, identifying possible solutions, and recommending management actions.

Role of 501 Commons Staff

501 Commons staff will:

- Negotiate the fee and the statement of work with the client.
- Send the contract to the client and a copy to you and to the consultant(s) working with you.
- Serve as an advisor and resource to you as you conduct your consulting assignment.
- Keep track of progress and monitor the consulting project.
- Review the consultants' draft and final reports.
- Follow-up with the client at the end of the project to assess their satisfaction.

Communicating with 501 Commons Staff

Most consulting assignments are carried out by a team of two or more consultants to provide peer support and the necessary skills and experience. One consultant needs to serve as the project lead and is responsible for communicating with 501 Commons staff on a regular basis, **generally every two weeks**. You should communicate with the program manager even if the situation has not changed or if everything is going well on the project.

Client Screening and Contracting Process

Most 501 Commons clients are already established nonprofit organizations. Occasionally, 501 Commons will work with an organization that is just getting started, but every effort is made to assure that the client has the capacity to follow through on the recommendations of the consultant(s). The contracting process is as follows:

1. Prospective clients complete a "Request for Assistance" form available online. A 501 Commons staff member contacts the client.
2. A drafted statement of work is prepared and reviewed with the client and prospective consultants.
3. A contract development meeting (in-person or by video conference) is held with the client, the consultants, and the 501 Commons staff to discuss the client's needs and to further develop the scope of work and deliverables for the contract. The contract is then developed, reviewed by the consultants, and sent to the client.
4. The contract, including the statement of work, projected consulting hours required for the project, the contract period, and the 501 Commons' fee is signed by 501 Commons' executive director and the client.
5. 501 Commons bills the client for the first half of the fee for the project.
6. A kickoff project meeting with the client lead (generally the organization's Executive Director and/or board members) is scheduled by the lead consultant to further plan the work.

Project Kick-Off Meeting

The agenda of the initial project meeting is to establish clear lines of communication between team members and with the client, get to know the organization, develop a more detailed project plan, and assure that everyone is clear about the project objectives. At this meeting you should discuss:

- Roles and responsibilities of each team member including the client representatives, the primary contact for the client.
- The statement of work including objectives, tasks, and project deliverables. Develop a more detailed plan that defines the internal deadlines and identifies interdependencies.
- The project risks and the strategies for managing the risks.
- The team process and administrative procedures (facilitation of meetings, note-taking, meeting times and frequency, etc.)

Client Meetings and Reports

Your team and the client will determine the frequency and scheduling of meetings and any oral and written reports needed. Keep an ongoing record of preparation times, meetings, discussion time, and tax-deductible expenses as you conduct your consulting assignment. You will receive a monthly request for your hours via email from 501 Commons.

In the first meeting with a nonprofit, consultants should dress in business attire. While men do not need to wear a suit and tie, business casual pants and a sports jacket would be appropriate and for women comparable attire, not jeans or shorts. Subsequent meetings may involve more casual dress but that this is something that could be discussed with the client at the first meeting or two. Clients quickly form an impression of 501 Commons, and professional business attire at the first meeting encourages them to see you as a professional even though you volunteer your time and expertise. When attending board meetings or representing the client with outside groups, particularly government officials or foundation officers, also dress in business attire.

Any project reports or memos should include the 501 Commons logo and identify the consultant as a 501 Commons consultant. If you have a private consulting practice, you should not use that practice name for 501 Commons projects.

If Problems Arise

Contact your 501 Commons staff lead for the project right away:

- If your availability becomes too limited to meet the needs of the client.
- If there are problems among your team members, or you find the team lacks specific skills needed to do the work.
- If you feel that a client is so uncooperative or unresponsive that the consulting assignment stands little likelihood of success. 501 Commons' client screening process attempts to screen out this type of client — but occasionally we encounter a very difficult client and termination of the assignment becomes necessary.

Concluding a Project

A project is completed when the objectives in the contract have been met. Be sure to review the statement of work frequently and have an explicit discussion with the client, to determine if the work is completed.

Contact your 501 Commons staff lead:

- When you have completed the work so that the second half of the consulting fee can be invoiced and the client asked to complete an evaluation of the project.
- If the client requests additional work over and above the original statement of work, 501 Commons can arrange a subsequent contract. If additional consulting assistance needs are identified as you complete the work, discuss this with the client. You and your current team members are not obligated to continue working with the client, but you should encourage the client to contact 501 Commons to discuss subsequent work.

Final Report

In most cases, the consultant or team will prepare a final written report to give to the client. A suggested format is included in Appendix F, “Final Report”.

The report should:

- Summarize the discovery or assessment process you used.
- Give your appraisal of the client’s situation or problem.
- Describe the work you have delivered to date.
- Explain your recommendations to the client.

Include enough information pertinent to the assignment so that even an outsider to the situation — an uninformed member of the client’s Board or someone new to the client organization—would comprehend the problem covered in the report and be able to weigh its recommendations fairly. Solutions to the client’s problems should be stated as objectively and precisely as possible. Make sure that the facts are correct, that opinions are identified as opinions and not as facts, and that the general content of the report satisfies the requirements of the assignment.

Before sharing the report with a client, you should send a preliminary draft to the 501 Commons staff lead for the project. It should be carefully edited for spelling, titles, format, grammar and content. If you need help making sure the report is professional in appearance, contact 501 Commons well ahead of the deadline.

Before presenting the report as a completion of contract work, review the final draft with your client. It is not expected that a client will concur with every recommendation contained in the report. Try to resist pressure to make changes that you feel would be unwise or inappropriate.

This is also a time for you to assess the client’s need for additional consulting assistance. This should then be discussed with 501 Commons staff lead for the project.

Evaluating the Success of a Project

It will strengthen communication between 501 Commons consultants and the client if evaluation and feedback are incorporated throughout the project. The primary way to evaluate the success of a consulting project is for you to assess the extent to which the objectives set forth in the consulting contact have been met. Be sure to assess progress on these objectives regularly.

501 Commons asks all clients to complete a post-project evaluation form (see Appendix F for an example). The form includes questions about the consultant's work on the project. If approved by the client, a copy of this evaluation will be sent to each member of the consulting team. Please note that clients are often reluctant to have their feedback shared with the client if the responses are not 100% positive. We try to convince clients that service corps members value feedback and do not expect 100% positive scores but some clients are unwilling to allow us to share their responses.

Lessons Learned and Debriefing Session

After the project is completed the project team should debrief and each consultant should complete a Lessons Learned Evaluation, which is intended to encourage reflection on how the project went. On this evaluation you will be asked to evaluate yourself using the same tool that is used by the client to evaluate you.

For Coaches

What Is Leadership Coaching?

Coaching is a process for nonprofit leaders to identify fundamentals in their personal and organizational values and to be more successful in achieving goals. Through examining their styles of learning, decision making, people management, and more, these leaders can build on their strengths and abilities.

Through sessions with a carefully chosen coach, individuals identify goals and barriers to success—then strategize actions and tools to help them achieve their objectives.

The International Coach Federation offers this description of the responsibilities of a coach:

- Discover, clarify, and align with what the client wants to achieve
- Encourage client self-discovery
- Elicit client-generated solutions and strategies
- Hold the client responsible and accountable

Our Philosophy

The 501 Commons Nonprofit Leadership Coaching Program is an individualized coaching process that supports leaders in making more conscious decisions about their professional and personal lives. The coaching model is a co-active, developmental process that fosters confidence and trust, encourages accountability, and builds leadership capacity.

Becoming a Coach

Coaches must be certified as coaches by a coach training program or have more than five years of coaching experience in the workplace using an approach to coaching similar to the 501 Commons coaching program. The matching process is based on an understanding of the leader's needs and the strengths and the experience of the coach.

Coaching Process

The coaching relationship is defined by two documents: the coaching contract (Appendix C, Part 2) and the coaching agreement.

Generally, the first meeting and the final meeting are done in person. The remaining meetings are on the phone. If desired by the client, the coach can meet with staff or board members to introduce the coaching process to the nonprofit organization.

Develop the Coaching Agreement

The coach and client will develop **a coaching agreement** during the first few weeks of working together. The agreement allows them to share a clear understanding of the purpose of the coaching process and agree on goals and approach. This agreement will include:

- The expectations and ground rules for the coaching relationship.
- The specific goals, issues, and changes in behavior the client wishes to address through the coaching process.
- This agreement is updated during the course of the engagement

During the coaching period

The role of the coach is to support the client by providing the tools for assessment and by supporting the learning process. The coach will:

- Assess personal style and areas of strength, and areas of opportunity using assessment instruments, as appropriate.
- Clarify key beliefs and behavior patterns using personal history and critical incidents.
- Understand assumptions and personal dynamics underlying behavior patterns.
- Assess the system of expectations, supports, and pressures that constitute the client's immediate context.
- Assess organizational culture and expectations related to success within the client's work environment.

Coaching sessions may include:

- Exercises to build awareness of current behavior patterns.
- Identifying options for alternative mental models and behavior patterns.
- Practice and feedback on alternative behavior patterns.
- Determining development strategies.
- Determining how to create an environment of understanding and support for the client's efforts.
- Observations of the impact of any changes in behavior, especially in situations that present significant challenges.

As the coaching relationship progresses, the coach and client will identify issues associated with "staying on course" and problem-solve them. As needed, the coach and client will modify goals and strategies to adapt to changing conditions. Self-observation may be augmented by direct observation by the coach and by feedback from others the client has identified as partners in the coaching process.

The coach should maintain brief notes of each coaching session to document the key themes that are discussed, as well as the insights, learnings, and challenges that emerge during each session. Both the learning agreement and coach's notes are reviewed by the coach and client before each session in order to reflect on the coaching experience and mark progress toward the client's goals..

Cost of Services

A sliding scale fee structure is used, similar to the one used for consulting. The hourly fees are on a sliding scale, based on the budget of the organization.

The coaching contract is generally for 10 to 15 contact hours over a six-month period. Coaching sessions are initially held weekly or bi-weekly depending on the client's availability. Each session should be scheduled for 60-90 minutes.

The hours included in the coaching agreement are hours spent directly with the client as well as the following types of activities that support the coaching process:

- Feedback and information-gathering from peers, direct reports, manager, and others identified by the client
- Identification of assessment tools and preparation of assessment reports
- Development of the coaching plan and revision of the plan as needed
- Preparation for coaching sessions
- Phone consultation on timely issues (between regular coaching sessions)

501 Commons assumes that the coach will spend up to an hour on preparation and documentation for each hour of coaching

Evaluation

The evaluation process is designed to identify how coaching impacted the issues originally identified by the client in the coaching agreement. The coach should also discuss with the client how coaching has affected his or her leadership of the organization. Being able to demonstrate organizational impact is important to 501 Commons' ability to garner additional clients and support from funders. Clients and coaches have an opportunity to evaluate their coaching experience at two points:

- After the fourth session
- Upon completion of coaching

In addition, clients are asked to respond to an online satisfaction survey at the end of the engagement. This survey includes an evaluation of the coach. The results of the evaluations are shared with coaches with the permission of the client.

Role of the Coaching Program Manager

The 501 Commons coaching program manager will:

- Determine the fee and send the contract to the client.
- Serve as an advisor and resource to you.
- Send the evaluation to the client.
- Communicate with 501 Commons.

Most coaching assignments are for six months. Contact the 501 Commons coaching program manager after the coaching agreement is in place (by meeting 3) to let us know how the coaching relationship is working, and again after your final session.

Client Meetings

Keep an ongoing record of preparation times, meetings, discussion time, and tax-deductible expenses as you conduct your consulting assignment. You will receive a monthly request for your hours via email from 501 Commons.

In the first meeting with a client and/or client's organization, coaches should dress in business attire. While men do not need to wear a suit and tie, business casual pants and a sports jacket would be appropriate and for women pants and a jacket or comparable attire, not jeans or shorts. Subsequent meetings may involve more casual dress but that this is something that could be discussed with the client at the first meeting or two.

Any written communication with the client should include the 501 Commons Logo and identify the coach as a member of the 501 Commons Executive Service Corps. if the coach has a private practice, the name of the company should not be on the report.

If Problems Arise

Contact the 501 Commons coaching program manager right away:

- If your availability becomes too limited to meet the needs of the client.
- If you feel that a client is so uncooperative or unresponsive that the coaching assignment stands little likelihood of success.

Concluding a Project

Contact the 501Commons coaching program manager when you have completed the coaching assignment. Let the 501 Commons coaching program manager know If the client requests additional coaching or discusses other needs that might be addressed by 501 Commons.

Common Challenges You Might Face

No consulting assignment is without its challenges! Here are eight common challenges that you might encounter in your work with 501 Commons clients:

It may be difficult to get a fix on the client's real problem

Following your initial meeting with the client, you may discover that the client's real problem is different than the problem that was originally identified. As you uncover areas that need to be addressed, you and the client may decide that the initial Statement of Work needs to be modified. (Contact your 501 Commons staff lead for the project to assist with revising the contract.) Your skills in ferreting out the real problem, earning the client's acceptance, and together seeking solutions are a great value. Asking questions and listening to answers is paramount— the most difficult thing for most of us is to really listen!

You may find it difficult not to jump to conclusions and may need to cultivate your listening skills

Since the initial phase of your consulting entails fact-finding, you will first find yourself in the role of listener. Hearing the client talk about the organization, its mission, and their personal motivations will give you important information you will need to do your job. In turn, as an impartial listener, you are also laying the groundwork for a relationship based on openness and trust. Patience, flexibility, and persistence are needed in the consultant role — and the cultivation of these skills will likely pay off for both you and the client in the overall satisfaction with the job you have done. It is particularly important to avoid specific suggestions or judgments during the initial phase of consulting.

You may need to gain a better understanding of how nonprofits differ from large businesses

The process of managing all organizations — establishing objectives, directing the attainment of objectives, and measuring results — is fundamentally quite similar in business, government, and nonprofit environments. However, there are differences that affect how you work with the organization and what recommendations are appropriate.

If you have worked in government or in large business environments, the most important difference to consider may be one of scale. In smaller nonprofit organizations, administrative staff often carry out multiple roles, sometimes including roles for which they have little formal training. Smaller organizations also have less formal structures for communication and decision making.

The focus nonprofit organizations give to carrying out their mission often results in administrative functions being under-resourced and in low investment in offices, furnishings, technology, and equipment. Nonprofit organizations are adept at making these trade-offs and you should not assume that their decisions are inappropriate without having a full understanding of the organization.

Decision-making in nonprofits may be more participatory. Organizations tend to have a much flatter structure than corporate environments and nonprofit boards play a broader role. There may be legitimate issues in the organization about the need to define executive authority, delineate the role of the board of directors, and formalize decision-making. However, you should not pass judgment on consensus-driven processes that may look inefficient until you have a good understanding of how these processes work in the organization.

You may have to deal with a foot-dragging client

“I can’t proceed any further until the executive director has met with the staff and board/written a report/made a few calls….” This consultant’s complaint about a foot-dragging client is a common one. Often the attention of the client’s executive director is focused on the crisis of the day rather than following up on agreed-upon activities related to the project. In order to avoid or mitigate this problem, it is helpful for you to:

- Establish regular meetings with the executive director or your primary client contact;
- Leave the primary contact with “homework” to do between meetings; and
- Refer to the stated objectives of the project and discuss them with the primary contact. 501 Commons staff is available as a third party if you wish to provide an additional nudge when you reach an impasse with a foot-dragging client.

It may be a challenge to maintain objectivity in the face of organization politics

At times, you may find that factors within the organization interfere with your ability to carry out an independent and objective analysis:

- An executive director's "hidden agenda" surfaces and you discover that there is pressure to make certain recommendations that you feel are inappropriate or unwise.
- Uneasy relations exist between the board and staff of the client organization, and you find yourself in an awkward position in terms of your relationship with each.
- The executive director attempts to limit your access to certain members of the board or staff — individuals who you feel need to be contacted in order for you to conduct an effective study.

Suggested ways to avoid or deal with these pitfalls are:

- In your initial meeting with the client, try to establish an atmosphere of candor. Encourage the client to "lay the cards on the table" at the outset. Use your best analytical skills in identifying and confronting any hidden agendas. Ask for agreement from the executive director to allow you access to any board members or staff you feel would be appropriate in conducting your analysis.
- Be mindful of who your client is. We may have been asked into the organization by the executive director, a board member, or another staff. You need to remain responsible to the client. Do not contact board or staff members without permission.
- Reassert the importance of the objective role of an outside consultant.
- If organizational politics continue to stand in the way of your conducting the assignment in a fair, accurate and thorough manner, discuss this with your 501 Commons' lead. The project may be suspended or terminated.

You may need to clarify the relationship between the Executive Director and the Board of Directors

In most nonprofit agencies, the executive director acts as the CEO with all staff reporting to him or her. The basic role of the board of directors' is to set policy, evaluate the organization's performance of its mission, and hire and evaluate the executive director. It is not unusual for this relationship to be very poorly defined and for each member of the board to have his or her own view of the board's role. The relationship between the executive director and the board is critical to the organization's survival and success and it is rare that we consult with an organization without getting involved in trying to clarify this relationship.

For most consulting projects it is helpful for 501 Commons consultants to spend time with the executive director, board president, and other board members to find out how staff and board interact. Consultants often arrange one-to-one interviews with the executive director and appropriate board members involved in the consulting project to assess and compare the key players' perspectives.

You must address the issue of implementation

You have only made an impact if the organization is able to successfully implement your recommendations. 501 Commons consultants need to go beyond answering the question "what should we do" to asking "how can we get it done?" It may be helpful for you to stay available to the client as an advisor as the client begins to implement your recommendations. The client may agree with your recommendations but have difficulty implementing them. Keeping in touch with the client during the implementation stage will help ensure follow-through on your suggestions. If you need to lengthen the contract in order to ensure that the organization is prepared to make use of your recommendations talk to the 501 Commons project lead about an extension on the contract date.

You might encounter problems with implementation

Be clear with the client that you are not the implementer of your recommendations. Your objective is to work closely with the client so that the client is able to carry out your recommendations.

Clients do not always implement consultants' recommendations. A client's calling in a consultant does not guarantee that advice will be accepted and changes made. Throughout the project have frank discussions with the client about their willingness and ability to implement the recommendations.

Be aware of and value cultural differences and strive for cultural proficiency

501 Commons serves very culturally diverse organizations. Being culturally proficient not about being blind to differences. It means that cultural differences are not a barrier to your effectiveness as a consultant. Consulting work with individuals and organizations in a multicultural environment requires the following behaviors:

- Value diversity. Enjoy the experience of getting to know people and/or an organization that is grounded in a language, communication style, experience, customs, beliefs, and values that may be different than your own.
- Demonstrate openness, acceptance, and a willingness to learn about the experience and culture of others. Do not assume that you will be competent in an environment very different from your own background and experience without asking for the guidance of your client.
- If you unintentionally offend someone, apologize, and ask for the information you need to be more effective in the future.

Culturally Competent Consulting

Guidance on culturally proficient practice for 501 Commons is provided by the Alliance for Nonprofit Management. The Alliance's Ethical Standards for Nonprofit Capacity Building state:

"Capacity builders shall be cognizant of the cultural dimensions of their work and the relationship between their own cultural identity and that of clients and communities. Capacity builders shall continually seek to achieve a high level of competency through self-awareness, learning, and building a diverse network of colleagues and partners."

Standards for inclusive and culturally proficient services provided by staff and volunteers are based on a framework originally developed by the Minority Executive Directors Coalition. The following describes 501 Commons' commitment to working in a culturally proficient manner:

Step 1: Recognize your own cultural frame and identity. Consistently pay attention to your own assumptions and cultural background, and reflect on how it may affect your interactions with people and their interpretation of the information you provide.

Reflect on which of the following agent and target categories apply to you.

	Agent/Privilege Status	Target/Limited Privilege Status
Age	Adults Early (25-35 years), Adults Middle (36-60 years)	Children, Youth (11 – 17), Youth Adults (18-24), Elders (61+ years)
Disability	Able-persons (Typical abilities)	Have a disability
Religion	Christians, Agnostics, and Atheists	Other religions, including Judaism, Islam, Sikhism, Hindu, Buddhist etc.
Ethnicity	European ancestry (White)	People of color
Social Class	Capitalist (Super Rich, Rich); Upper, Middle; Mid-Middle, Some Lower Middle (based on professional status)	Lower Middle (without professional status), Working Class, Working Poor, unemployed
Sexual Orientation	Heterosexual	Homosexual, Bi-sexual
Indigenous Heritage	Non-indigenous to the US	Native American, Latino
National Origin	US born	Immigrant/refugee
Gender	Male, cis-gender	Female, not cis-gender

Before engaging with clients it is helpful for 501 Commons staff and service corps members to reflect on your own agent or target membership and your own cultural frame of reference. Each of the agent categories conveys privilege which must be recognized when entering into relationships with people who are targeted because they have the characteristics on the right side of the table. Engage in continuous learning and reflection, gaining an understanding of your own cultural identity and its impact on your relationships with others.

If you are white, it is helpful to read or watch webinars or videos on the topic of white privilege in order to understand that white privilege is not about attitude or belief systems, it simply is bestowed in US society on people who are white, especially those who are white and have other agent memberships.

501 Commons’ standards for inclusive and culturally proficient services provided by staff and volunteers is based on a framework originally developed by the Minority Executive Directors Coalition and on the work of Leticia Nieto. We strive to utilize a set of behaviors, attributes, and practices enabling the consultants to work effectively in cross-cultural and multicultural settings. The following describes 501 Commons’ commitment to working in a culturally proficient manner.

Step 2: Familiarize yourself with the organization and the history and culture of the people with whom you will be working. When working with an organization or a person from one of the "target" categories, examine how you are influenced by stereotypes, biases, or your assumptions. All people have implicit biases. The goal is to be a person who examines those biases so that they do not cause misunderstandings, show disrespect, or cause you to make incorrect decisions.

Become familiar with the history and characteristics of client agencies, including the ethnic and racial makeup of staff, board, and clients.

Examine both the assets and the needs of the agency and people with whom they work.

Build bridges across your cultural differences, recognizing that there are individual differences within cultural groups.

Step 3: 501 Commons service corps members and staff will demonstrate the following elements of a culturally competent practice:

Frame issues and the consultation process in a way that values multiple perspectives.

Review and assess 501 Commons consulting approaches to ensure that they are culturally sensitive, inclusive, and effective.

Create emotional safety and build trust by treating people with respect and by communicating clearly.

Respect and value other cultures and demonstrate an appreciation for various ways of learning.

Appendix A: Volunteer Confidentiality & Conflict of Interest Statement

Confidentiality

I agree to hold in confidence all information marked or identified as confidential I become privy to regarding clients of 501 Commons. I will not remove from the office of 501 Commons or any 501 Commons client any electronic or written records, or copies thereof, without express permission of 501 Commons or 501 Commons' client. I accept full responsibility for maintaining the confidential nature of all records, client contacts, and information marked confidential.

Conflict of Interest

In order to avoid an actual or perceived conflict of interest, I agree to refrain from accepting board membership, independent consulting contracts, or paid employment with a client while I am serving as an assigned 501 Commons volunteer consultant for that client. After I have completed the 501 Commons assignment, I understand that I am free to accept such offers and will notify 501 Commons that I have done so.

I understand that I am personally responsible and fully liable for any violation of this agreement.

Volunteer Signature   Date

____

Print Name______________________________________

____

501 Commons Representative Signature   Date

Appendix B: Volunteer/Consultant Responsibilities

Your responsibilities to 501 Commons

- Present a professional image when representing 501 Commons in the community. Never make remarks that disparage or stigmatize the staff, board, or clients of the organizations you serve through 501 Commons.
- Maintain communication with 501 Commons including:
  - Accurate information regarding your skills, interests, talents, and availability
  - An up-to-date resume, contact information, and brief bio for 501 Commons to share with clients
  - Responding promptly to requests from 501 Commons
- Promote 501 Commons in the general community, to friends and colleagues who may be interested in joining, and—especially—within the nonprofit community. Word of mouth remains our greatest source of new clients.
- Participate in the 501 Commons professional development program and commit to your own learning.
- Contribute to strengthening the organization by making financial contributions, participating on committees and workgroups, or volunteering do special projects such as develop new programs, write grants, or help with marketing.
- Follow 501 Commons standards and procedures and adhere to the ethical standards of consulting, including telling the truth, maintaining confidentiality, and serving the best interests of your client.

Consultants' Orientation toward Our Clients

You will enjoy your work and make a more significant contribution if you demonstrate the following behaviors and traits:

- Be a patient listener/learner and do not jump to conclusions. Practice active listening. Repeat and reaffirm what you heard in order to maintain communication.
- Be honest about what you can do and by when you will have it done. Always do a little more than you promise.
- Don't say anything to or about your clients that you wouldn't want to be passed around.
- Speak the client's language. Don't force them to learn yours.
- Pass your knowledge and experiences on to others. Share, coach, and advance the abilities of others.
- Respect the strengths and accomplishments of the organization.
- Communicate with team members, 501 Commons, and the client more often than you think is necessary.
- Focus on the client's future results, not you're past experiences or accomplishments.
- Keep aware of the relationships and inter-dependencies among project tasks. Ensure that what you're doing is what the client is paying for.
- Keep learning and sharing new and better ways of getting things done.

Responsibilities during the Project

- Become familiar with the organization before the first meeting by reading the request for assistance, visiting the website, and internet searches. Stay mindful of the organization's culture and purpose throughout the consultancy.
- Clarify regularly what information is confidential. Never share confidential information with anyone inside or outside of the organization without the approval of the client.

- Ask permission of the client's liaison/contact person before speaking to members of the Board and staff.
- Be responsive to a client's phone calls and e-mail messages by responding in a timely manner (generally within 48 hours). Inform the client if you're planning to be out of town. Complete the work contained in the statement of work in a timely and complete manner, if possible, doing more than you had promised.
- Provide periodic progress reports to the 501 Commons staff lead for the project (generally every 2-3 weeks). **Let 501 Commons staff know right away if problems or misunderstandings arise**.
- Keep track of your hours and submit them to 501 Commons monthly.
- Let 501 Commons know if you think the project cannot be completed within the allotted hours or time frame.
- Review the 'preliminary draft' of the final report with the 501 Commons staff. Review the 'final draft' of the final report with the client, generally the executive director. Ask if they would like to share the final draft with the Board chair, other board members, or other staff. Do not share the final draft with others without permission from the client.
- Submit the Final Report to the client. When possible, participate in an oral presentation of the final report to the board of the organization (it is often effective for the staff to take the lead in presenting the report to the organization's board or appropriate management group).
- Participate in a debriefing session with the team (see Appendix G).

Appendix C: Sample Contracts

Consulting Agreement

Client Name: Click here to enter text.

The success of a consulting relationship depends on a clear understanding between the consultants and the client about the nature and scope of the consulting services. Accordingly, Client and 501 Commons mutually agree as follows.

Statement of Work

501 Commons consultant(s) Click here to enter text. will Click here to enter text.

Project Deliverables

It is estimated that this work will require approximately Click here to enter text. hours of consulting time.

Client Responsibilities

The Client assumes joint responsibility with 501 Commons for a successful project outcome. The Client will provide information and access to the organization as needed for the consultants to provide informed recommendations. The Client will participate with the consultants in the development of the project recommendations and will implement these recommendations within its best judgment.

The Client will provide feedback to the consultants and to 501 Commons by completing a project evaluation form, which will be provided at the end of the project.

Concerns about the direction of the project or the conduct of the consultants should be discussed first with the consultants themselves, then with the project manager. Unresolved concerns or complaints may be reported to the 501 Commons executive director, Nancy Long, at nancy@501commons.org.

Terms of Agreement

This agreement shall become effective when signed by both parties. Project work shall begin on Click here to enter text. and will be completed by Click here to enter text.. Either party may terminate this agreement at any time by providing written notice to the other.

Minor revisions, including timeline adjustments, may be made to this Agreement with the verbal consent of both parties. Changes to the Statement of Work, Project Deliverables, or Fee will require an amendment to be signed by both parties.

Fee

The services provided under this Agreement are valued at $Click here to enter text.. A service grant of $Click here to enter text. is being provided as an in-kind donation to the Client from 501 Commons. The Client will pay a total of $Click here to enter text.

The value of the service grant provided by 501 Commons should be reported in the Client's financial statements as Contributed Services, as described by SFAS NO. 116, paragraph 9. Please contact 501 Commons if you need assistance in recording this transaction.

Payment Terms

One-half the total fee ($Click here to enter text.) will be invoiced when this Agreement is signed. After completion of the work described herein, the balance of the fee will be invoiced. A late payment charge of 7% will be applied to unpaid balances beginning 60 days after the date of the invoice. Unless otherwise agreed to in writing by both parties, the Client shall be solely responsible for any expenses incurred in connection with this Agreement.

Responsibilities of 501 Commons

The parties agree that the role of 501 Commons is advisory and facilitative in nature. All 501 Commons consultants sign the following confidentiality agreement: "I agree to hold in confidence all information marked as confidential that I become privy to regarding clients of 501 Commons. I will not remove from the office of 501 Commons or a 501 Commons client any electronic or written records, or copies thereof, without express permission of 501 Commons or 501 Commons' client. I accept full responsibility for maintaining the confidential and private nature of all records, client contacts, and information that are marked confidential."

Independent Contractor

501 Commons is an independent contractor.

Best Efforts

501 Commons and its consultants supply services and make recommendations on a best efforts basis. The signing of this Agreement releases 501 Commons, its officers, volunteers, board members, and staff from any and all liability in connection with the assistance or recommendations provided.

Leadership Coaching Agreement

Client Name: Click here to enter text.

The success of a coaching relationship depends on a clear understanding between the coach and the client about the nature and scope of the coaching services. This understanding will be incorporated into a learning agreement developed by the coach and the client in initial meetings. Accordingly, Client and 501 Commons mutually agree as follows.

Statement of Work

A total of 15 hours of coaching will be delivered over a six-month period. Sessions may be conducted in person or by phone. Sessions will be scheduled for a period of Click here to enter text. hours, and may be supplemented with emails or phone calls.

Terms of Agreement

This agreement shall become effective when signed by both parties. The term shall begin on Click here to enter text. and will be completed by Click here to enter text.. Either party may terminate this agreement at any time by providing written notice to the other.

Minor revisions, including timeline adjustments, may be made to this Agreement with the verbal consent of both parties. Changes to the Statement of Work or Fee will require an amendment to be signed by both parties.

Fee

The services provided under this Agreement are valued at $Click here to enter text.. A service grant of $Click here to enter text. is being provided as an in-kind donation to the Client from 501 Commons. The Client will pay a total of $Click here to enter text. (a rate of $Click here to enter text. per hour, or Click here to enter text.% of market rate).

The value of the service grant provided by 501 Commons should be reported in the Client's financial statements as Contributed Services, as described by SFAS NO. 116, paragraph 9. Please contact 501 Commons if you need assistance in recording this transaction.

Payment Terms

One-half the total fee ($Click here to enter text.) will be invoiced when this Agreement is signed. After completion of the work described herein, the balance of the fee will be invoiced. Payment is due within 30 days of receipt of invoices. A late payment charge of 7% will be applied to unpaid balances beginning 60 days after the date of the invoice. Unless otherwise agreed to in writing by both parties, the Client shall be solely responsible for any expenses incurred in connection with this Agreement.

Client Responsibilities

The Client assumes joint responsibility with 501 Commons for a successful project outcome. The Client will provide information as needed for the coach to engage successfully with the Client.

The Client will provide feedback to the coach and to 501 Commons by completing a project evaluation form, which will be provided at the end of the project.

Concerns about the direction of the project or the conduct of the consultants should be discussed first with the coach, then with the project manager. Unresolved concerns or complaints may be reported to the 501 Commons executive director, Nancy Long, at *nancy@501commons.org*

By signing this Agreement, I acknowledge that I understand and agree that:

1. I am fully responsible for my physical, mental, and emotional well-being during my coaching calls and meetings, including my choices and decisions. I am aware that I can choose to discontinue coaching at any time.
2. I understand that coaching is a professional-client relationship that is designed to facilitate the creation/development of personal, professional, or business goals and to develop and carry out a strategy/plan for achieving those goals.
3. I understand that coaching is a comprehensive process that may involve all areas of my life, including work, finances, health, relationships, education, and recreation. I acknowledge that deciding how to handle these issues, incorporating coaching into these areas, and implementing my choices is exclusively my responsibility.
4. I understand that coaching does not involve the diagnosis or treatment of mental disorders as defined by the American Psychiatric Association. I understand that coaching is not a substitute for

counseling, psychotherapy, psychoanalysis, mental health care, or substance abuse treatment. I will not use coaching in place of any form of diagnosis, treatment, or therapy.

5. I certify that if I am currently in therapy or otherwise under the care of a mental health professional, that I have consulted with my health care provider regarding the advisability of working with a coach, and that this person is aware of my decision to proceed with the coaching relationship.
6. I understand that information will be held as confidential unless I state otherwise in writing, except as required by law.
7. I understand that coaching is not to be used as a substitute for professional advice by legal, medical, financial, business, spiritual or other qualified professionals. I will seek independent professional guidance for legal, medical, financial, business, spiritual, or other matters. I understand that all decisions in these areas are exclusively mine and I acknowledge that my decisions and my actions regarding them are my sole responsibility.

Responsibilities of 501 Commons

The parties agree that the role of 501 Commons is advisory and facilitative in nature. All 501 Commons consultants sign the following confidentiality agreement: "I agree to hold in confidence all information marked as confidential that I become privy to regarding clients of 501 Commons. I will not remove from the office of 501 Commons or a 501 Commons client any electronic or written records, or copies thereof, without express permission of 501 Commons or 501 Commons' client. I accept full responsibility for maintaining the confidential and private nature of all records, client contacts, and information that are marked confidential."

Independent Contractor

501 Commons is an independent contractor.

Best Efforts

501 Commons and its consultants supply services and make recommendations on a best efforts basis. The signing of this Agreement releases 501 Commons, its officers, volunteers, board members, and staff from any and all liability in connection with the assistance or recommendations provided.

Appendix D: Hours Reporting

Accounting for volunteer hours is critical to managing contracts and to our grant reporting. You can keep track of hours in whichever way works best for you. We can send you a template like the one below if you would like. Report all hours you spend on the project, not just hours with the client.

We will contact you monthly when you are on a project to ask you to report your hours.

Timesheet					
501 Commons Consultant:		(First Name Last Name)		**Month:** January 20XX **Timesheet**	
Project	**Date**	**Location**	**Purpose**	**Time**	**Hours**
CDE	1-11	Starbucks	Meeting prep	12-1	1
CDE	1-11	CDE office	Team meeting	1-3:15	2.25
501 Commons Technology Leadership Council	1-31	501 Commons	Council meeting	3-5:30	2.5
Total Hours					

Appendix E: Expense Reporting and Reimbursement

Rarely consultants will have costs related to client work. You can track these expenses with the below form. Note that consultants are expected to cover the cost of parking, coffee, and incidental copying on their own but may track and report their incidentals to the IRS as is applicable. If there is a cost that you are unsure of, please reach out to your 501 Commons Program Manager. For expenses not billable to the client, you can use the bottom half of the form for IRS deductible out of pocket expenses.

Project Expenses to be Billed to Client			
Notify the client in advance of estimated costs to be billed to the client for approval. If only one expense, submit to the client directly. Consultants are expected to cover incidentals such as meals, parking, and travel. If more than one expense or expenses from several consultants, submit to 501 Commons for reimbursement.			
Date	**Project**	**Item**	**Amount**
Total Expenses			

Tax-deductible Expenses for 501 Commons Projects		
KEEP THIS PORTION FOR YOUR TAX RECORDS 501 Commons does not reimburse consultants for their expenses IRS rules allow you to deduct your out of pocket expenses (coffee, copies, etc.) and mileage. Check the IRS website for the current mileage rate for volunteer activities. 501 Commons cannot provide advice on claiming deductions.		
Date	**Description**	**Amount**
	Total Expenses	

Appendix F: Project Report Template

501 COMMONS

Sample Project Final Report

<table>
<tr><td rowspan="4">Client:

Project Name:</td><td colspan="2">Consultants:</td></tr>
<tr><td>Name</td><td>PH:</td></tr>
<tr><td>Name</td><td>PH:</td></tr>
<tr><td>Name

Name</td><td>PH:

PH:</td></tr>
<tr><td>Key contact: PH:</td><td colspan="2">Date</td></tr>
</table>

1. **Executive Summary:** (If the final report is lengthy - sets forth the principal conclusions and recommendations.)
2. **The assignment:** (A restatement of the nature of the Statement of Work from the contract. If the work was subsequently changed, the new agreed-upon assignment should appear instead.)
3. **Background description of client organization:** (A brief description of the client organization and acknowledgment of the executive personnel who have worked with the consultant.)
4. **Procedures used by the consultant:** (What steps the consultant took to understand the nature of the problem.)
5. **Summary of key findings:** Highlights of the consultant's principal observations.
6. **Specific recommendations:** The consultant's specific recommendations, together with their suggestions regarding time requirements, priorities for action, cost factors, and other significant data.
7. **Conclusion:** If suitable, the consultant may provide a concluding summary stating their opinions about the need for further activity, the potential benefits that might flow out of the recommendations, and any possible pitfalls of which the client should be aware.

Appendix: It is sometimes appropriate to include an appendix for any additional information, which might be helpful to the client although not essential to the recommendations themselves.

Appendix G: Lessons Learned Report Form

Instructions

The Lessons Learned report is a chance for you to reflect on the project and consider what went well and what could have been improved. We know that service corps members want to meet our clients' needs and expectations. By filling out this report at the end of a project you can help 501 Commons staff improve the consulting process and provide better support to our service corps members and our clients.

Section 1 should be completed by the entire consulting team, preferably in a group discussion. Section 2 should be completed separately by each consultant on the project. Section 3, which is optional, may be completed individually. Completed reports should be returned to the program manager for this project or mailed to 510 2nd Avenue W, Seattle, WA 98119. Please also contact your project manager with any questions you have about the report.

Client Organization: ____

Service Corps Members:____

SECTION 1: Project and Team

		Strongly agree 4	Somewhat agree 3	Somewhat disagree 2	Strongly disagree 1
1	The objectives/deliverables for this project were clearly defined in the contract.				
2	Each team member's role in accomplishing the deliverables was clearly defined.				
3	The team and client meetings were efficient and effective.				
4	501 Commons staff provided the necessarysupport for this project.				
5	"People issues" or personality conflicts within the client organization affected the success of this project.				
6	The team's approach fit the client's goals, organizational dynamics, and methods of operation well.				
7	All of the project deliverables were completed within the time limits stated in the contract.				

8	Overall, how satisfied do you think the client will be with the team's performance? Very satisfied Satisfied Somewhat dissatisfied Dissatisfied	
9	Please check any barriers that you feel might limit the client's implementation of the team's recommendations. Lack of time Lack of funds Lack of staff Lack of org. capability Lack of leadership/board support More consulting help needed first Not sure where to start/too drastic a change No barriers Other reason (please describe):______________________________ ______________________________ ______________________________	
10	Please describe your estimate of the impact of the project on the organization. Due to the consultation, what do you feel the organization is now more able to accomplish? ______________________________ ______________________________ ______________________________ ______________________________	

Comments

If you have comments to add on any of the above questions, please enter them here.

Appendix H: Client Evaluation Form

Name of Organization: Person Responding:

Consultant(s): Today's Date:

Check Box for Type of Consulting Services received:

☐ Strategic/operational planning	☐ Program development	☐ Operations
☐ Board development & training	☐ HR management	☐ Org. development
☐ Marketing and/or PR	☐ Mtg/retreat facilitation	☐ Financial consultation
☐ Interviews, surveys or market research	☐ Leadership Coaching	☐ Other

	Please rate the following statements:	Strongly agree 4	Somewhat agree 3	Somewhat disagree 2	Strongly disagree 1	N/A
1.	Working with 501 Commons **has made a positive difference** in our ability to accomplish our mission.	☐	☐	☐	☐	☐
2.	Working with 501 Commons helped our organization operate **more effectively**.	☐	☐	☐	☐	☐
3.	By working with 501 Commons, our organization achieved some positive **results that were *unexpected***. Please describe:	☐	☐	☐	☐	☐
4.	I would **work with 501 Commons again** if our organization had a need in the future.	☐	☐	☐	☐	☐
5.	The **fee we paid to 501 Commons was appropriate** for this project.	☐	☐	☐	☐	☐
6.	I would **recommend 501 Commons** to other nonprofit organizations.	☐	☐	☐	☐	☐
7.	The specific **objectives or change** we identified in our 501 Commons contract have a strong likelihood of being achieved.	☐	☐	☐	☐	☐

8. Check any **barriers** that might limit implementation of the **key recommendations** suggested by your ESC consultant(s):

Lack of time	Lack of funds	Lack of staff	Lack of org. capability	Lack of leadership/ board support	Need more consulting help first
☐	☐	☐	☐	☐	☐
Reason(s) not listed:			Need to wait to start ☐	Not sure where to start or too drastic a change ☐	NA or No barriers ☐

9. Please comment here to clarify your responses to any of the questions above:

10.	As a result of the work with 501 Commons, we are better able to:
11.	What suggestions for improvement do you have for 501 Commons?

Spread the word! Please provide a statement that we can share in our program materials or grant requests that describes what changed in your organization as a result of the work done with ESC; comments about the way the services are provided; or comments about the consultants you worked with.

______ Yes, you may quote me *(please initial)*

Individual Consultant Evaluation *(Please fill one out for each consultant on your project.)*					
Name of Consultant		**Strongly agree** **4**	**Somewhat agree** **3**	**Somewhat disagree** **2**	**Strongly disagree** **1**
1.	Consultant showed **respect for the unique culture,** strengths and accomplishments of our organization.	☐	☐	☐	☐
2.	Consultant **spoke our organization's language** and didn't expect us to learn hers/his.	☐	☐	☐	☐
3.	The consultant **shared** his/her knowledge and it **helped us** broaden our knowledge or abilities.	☐	☐	☐	☐
4.	Consultant **kept his or her commitments** with our organization – they did what they said they would do.	☐	☐	☐	☐
5.	The advice or recommendations of our consultant **reflected a good understanding** of our organization.	☐	☐	☐	☐
6.	Consultant **communicated with us** as needed.	☐	☐	☐	☐
7.	This consultant communicated in **clear and understandable** way.	☐	☐	☐	☐
8.	This consultant had the **expertise** required for this project.	☐	☐	☐	☐
9.	This consultant was a **good match** for our organization.	☐	☐	☐	☐
10.	What suggestions for improvement do you have for this consultant or other comments you have related to the above questions?				