CONSULTING TEAM STARTER KIT

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Edited by: Uyen Dang, VP of Project Management

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OVERVIEW

This document is meant to serve as a guide for Endeavour Volunteer Consulting for Non-Profits (Endeavour) consulting teams. It consists of an overview of Endeavour, typical clients, the composition of consulting teams and key resources that each team can leverage. In addition, there is a suggested breakdown of how the project may be structured. The end goal is to deliver value to your client by fulfilling your project objective.

As a volunteer with Endeavour, you will have the opportunity to make a positive impact in the community by assisting the leaders of a non-profit organization in improving their organization's capacity and performance. You will work with and develop friendships with like-minded individuals, gain consulting experience and exposure to different areas of work in addition to new career paths.

Endeavour's project cycles correspond with the spring/summer and fall/winter seasons. The spring/summer cycle is from mid-March to mid-September, and the fall/winter cycle is from mid-September to mid-March. Each project cycle consists of 3 major phases:

- Phase 1: Statement of Work Development
    - Phase 1a: Team Formation
    - Phase 1b: Project Scoping & Initial Hypotheses
- Phase 2: Research Plan Execution
    - Phase 2a: Data Gathering
    - Phase 2b: Analysis of Data
    - Phase 2c: Recommendations
- Phase 3: Client Deliverables

Please note that the above phases are suggested guidelines to help teams structure their respective projects and not meant as an absolute rule. However, the end of each phase is marked by a deliverable as described below. We recommend that each team complete each deliverable as it will aid you in the timely completion of the project. The end of each phase also requires a meeting with your advisor(s). We recommend that each team make use of their advisor(s) through the duration of the project to ensure that the project is in line with the stated objectives and that the final recommendations are consistent with the research conducted.

CONSULTING WITH THE NON-PROFIT SECTOR

Our Role as Management Consultants with the Non-Profit Sector

The non-profit sector is a key contributor to Canada's economic strength and the quality of life in communities. Non-profit organizations often fill the gaps left by government and the for-profit sector. Yet, many non-profit organizations accomplish their work with limited financial and human resources.

Endeavour's vision is a world where access to professional consulting services is not a barrier to non-profit organizations in achieving their goals, regardless of their financial capacity. As such, our mission is to serve non-profit organizations that otherwise cannot afford professional consulting. We do so by engaging volunteers in providing the consulting services.

As management consultants, our goal is not to make our non-profit clients more "business-like". To quote *Good to Great and the Social Sectors: Why Business Thinking Is Not the Answer* by Jim Collins:

> We must reject the idea—well-intentioned, but dead wrong—that the primary path to greatness in the social sectors is to become "more like a business." Most businesses—like most of anything else in life—fall somewhere between mediocre and good…
>
> [A] man who built a very successful company and who now spends nearly half his time working with the social sectors [said], "In my work with nonprofits, I find that they're in desperate need of greater discipline—disciplined planning, disciplined people, disciplined governance, disciplined allocation of resources."
>
> "What makes you think that's a business concept?" I replied. "Most businesses also have a desperate need for greater discipline…

As Endeavour management consultants, our goal is not to make our non-profit clients more "business-like". Our role is to help leaders of non-profit organizations to improve their management discipline, to increase their organizational capacity to perform and make a greater impact in the communities they serve.

Did you know?

By volunteering with Endeavour, your company may give a charitable donation to Endeavour through their Volunteer Grants program. Check your HR intranet site to see if your company has a Volunteer Grants program.

THE CLIENT

Endeavour's clients are registered non-profit or charitable organizations, primarily in the Greater Toronto Area, with an annual budget of $2 million or less. The client's mission is focused on solving a social problem. Further, the client must have been in operation for a minimum of 2 years, with the capacity and commitment to implement the recommendations arising from the Endeavour consulting engagement. A client project is typically in the management area such as strategic analysis and must be designed to be completed within 6 months.

Endeavour's clients are selected based on the following requirements:

1. Registered non-profit or charity: The client is incorporated as a non-profit organization or registered as a charity.

2. Social Mission: The client's mission is primarily focused on solving a social problem (e.g. children and family services, disabilities, education, environment, healthcare, immigrant services, rural development, poverty relief, seniors, youth development).

3. Budget: The client has an operating budget of about $2 million or less. Endeavour Volunteer Consulting for Non-Profits serves non-profit organizations that otherwise may not be able to afford consulting services. Departments/centres that have an operating budget of about $2 million or less, but are part of an organization with a multi-million dollar budget (e.g. hospitals/universities) may be eligible.

4. Human Resources: The client is staffed by volunteers and/or employees, has a Board of Directors and has the human resources to implement recommendations.

5. Years in Operations: The client organization or its parent organization has been in operation for a minimum of two years, with demonstrable achievements.

6. Local: The client serves a local/provincial/national market in Canada. Endeavour does not have the expertise or resources to provide consulting services for international development projects, but applications from international development organizations that also have operations and clients/markets in Canada will be considered

7. Contact persons: The client will provide two key contacts at the executive and board levels for the entire duration of the project. These contact persons must be accessible by email and telephone on a regular basis, and at least one of the key contacts can meet in person with the consulting team in the Greater Toronto Area during the engagement, including outside regular work hours.

8. Project focus: The client's project requires strategic analysis and advice in a business/management area (e.g. strategic planning, business planning, marketing strategy, feasibility study).

The following areas are out of scope for projects:

- Fundraising strategies or direct fundraising
- Donor strategies: donor markets research, donor engagement, identification, segmentation, communications
- Board governance strategies, board succession
- Grant writing
- Providing workshops to external stakeholders

9. Project length: The client's project can be designed to be completed in six months.

10. Expenses: The client's project does not require Endeavour Volunteer Consulting for Non-Profits or its volunteers to incur expenses (this excludes general expenses associated with commuting within the Greater Toronto Area).

11. Evaluation: The client's organization is committed to a post-project evaluation, including developing success metrics with the consulting team and cooperating in follow-up meetings with the Endeavour Executive Team to measure project success.

THE CONSULTING TEAM

An Endeavour team is typically composed of 5-6 consultants led by an engagement manager. Each team is supported by 1 or 2 member(s) of the Advisory Committee and Subject Matter Experts (SMEs) are available for more specialized support. Teams are also encouraged to reach out to Endeavour executives for additional support or other administrative matters.

Teams generally consist of 5 to 6 consultants with the following roles:

- Engagement Manager
- Senior Consultant (returning consultants who have completed an Endeavor consulting engagement)
- Consultant

Playing a supporting role, we have:

- Endeavour Executive
- Advisory Committee
- Subject Matter Experts (SME’s)

THE ADVISORY COMMITTEE

Each team will have 1 to 2 advisor(s) from the Advisory Committee that will work with consultants throughout the engagement, guide their work, and provide additional expertise. Members of the Advisory Committee have in-depth knowledge and experience in consulting and/or the non-profit sector and are instrumental to the success of the consulting engagements.

In addition to the advisors assigned to the projects, teams can also reach out to other members on the Advisory Committee to obtain subject matter guidance through the Project Manager.

The role of the advisor is to:

- guide and advise;
- monitor progress and identify gaps;
- clarify deliverables; and,
- evaluate and provide feedback on the final report and presentation.

Teams are recommended to set meeting and communication expectations (i.e., method of contact, frequency of emails, meeting dates etc.) at the beginning of the engagement with the advisor.

Teams are encouraged to gather feedback from the advisor throughout the engagement, and at a minimum, before finalizing the following deliverables:

- Statement of Work (SOW)
    - The advisor is expected to attend the initial client meeting with the team to help clarify the problem and scope of work, which will contribute to the development of the SOW.
- Mid-term presentation
- Final report and presentation

A full guidance document related to the roles and responsibilities of an advisor is available on the Knowledge Management Repository.

A Subject Matter Expert Request Form can be found in Appendix F, which can be used to request assistance from the Advisory Committee through the team's Project Manager.

RESOURCES

The following resources are available to assist with the engagement process:

Knowledge Management Repository – 'Knowledge Center'
https://endeavourconsultingca.sharepoint.com/sites/EVCNKnowledgeCenter
Access will be provided by Endeavour IT request

Past Deliverables
Most up-to-date deliverables can now be found in Endeavour's Google drive link below:
https://drive.google.com/drive/u/2/folders/1EzA2zK4LMiy3ymttEDUjJdBtga7v2EH1

The Advisory Committee and Subject Matter Experts (SMEs) –
Contact your Project Manager for support with finding the right SME.

Meeting Rooms at Lough Barnes Consulting Group
Lough Barnes Consulting Group has partnered with Endeavour to provide office space for engagement team meetings. Contact volunteer@endeavourvolunteer.ca for details.

Key Executive Contacts

Project Management
The Endeavour Project Managers and the Director(s) of Project Management are your main executive contacts during the consulting engagement. They can be reached through volunteer@endeavourvolunteer.ca. Your assigned Project Manager is your first point of contact for any inquiries, comments, and issues. For urgent or very sensitive requests, copy the Director of Project Management, Uyen Dang at uyen.dang@endeavourvolunteer.ca.

Learning & Engagement
The Director of Learning & Engagement, Chris Zegarra is your key executive contact for orientation, learning, and training content development. He can be reached at chris.zegarra@endeavourvolunteer.ca. For urgent requests, copy the Vice-President of Learning & Engagement, Doris Duan at doris.duan@endeavourvolunteer.ca.

Client Relations
The Director of Client Relations, Yolanda Yan is your main executive contact for inquiries and comments specific to the clients. She can be reached at contact@endeavourvolunteer.ca or if your request is urgent, copy Yolanda Yan at yolanda.yan@endeavourvolunteer.ca.

Evaluation

The Co-Directors of Evaluation Matthew Murray and Nicole Lund are your key executive contacts for inquiries and comments specific to Client Evaluation, Post Engagement Volunteers Evaluation and Client Impact. They will also be the person to contact to provide confidential feedback on your experience or suggestions of how we can make your experience even better.The Evaluation team conducts an end of engagement survey to elicit feedback from the consulting teams after the final client presentation. They can be reached at matthew.murray@endeavourvolunteer.ca and nicole.lund@endeavourvolunteer.ca. For urgent requests, copy the Vice-President of Evaluation, Ilene Hyman at ilene.hyman@endeavourvolunteer.ca.

For all other inquiries, email volunteer@endeavourvolunteer.ca and your email will be directed accordingly.

PROJECT CYCLE

Spring/Summer & Fall/Winter Project Cycles

Endeavour's project cycles correspond with the spring/summer and fall/winter seasons. The spring/summer cycle is from mid-March to mid-September, and the fall/winter cycle is from mid-September to mid-March. Each cycle consists of a new "round" of volunteers and clients. The number of clients and volunteers in each consulting round varies depending on the suitability of project applicants and Endeavour's capacity. Consulting rounds consist of new and returning volunteers, and sometimes, returning clients as well.

Three-Phase Cycle

Each project cycle consists of 3 phases, as noted here, and explained in detail further below:

- Phase 1: Statement of Work Development
    - Phase 1a: Team Formation
    - Phase 1b: Project Scoping & Initial Hypotheses
- Phase 2: Research Plan Execution
    - Phase 2a: Data Gathering
    - Phase 2b: Analysis of Data
    - Phase 2c: Recommendations
- Phase 3: Client Presentation

Note: The sections below are structured as follows:

- Deliverables*, duration, and suggested readings.
- Action items
- Phase deliverable description
- End of Phase meeting objective and agenda

*Please note that the deliverables for each phase are internal to Endeavour. These are due for sign off and review by your advisor(s). Your final deliverable to the client will be produced for Phase 3: Client Presentation which will include a report/presentation and additional supporting documents.

PHASE 1: STATEMENT OF WORK DEVELOPMENT

The activities that make up Phase 1 of the consulting engagement centre on developing the Statement of Work, which specifies the consulting team's deliverable(s) to the client and the process and milestones involved in producing the deliverable(s).

PHASE 1A: Team Formation

Readings: **Team Building Exercise – Setting Team Ground Rules**
Duration: **1 – 2 weeks**
Deliverable: **Team Charter**

The key goal of this phase is to get to know your team and advisors and establish internal processes. This may involve setting up norms and developing a Team Charter. By investing the time in getting to know your team and establishing team rules and expectations, the team is off to a great start to their project.

PHASE 1B: Project Scoping & Initial Hypotheses

Deliverable(s): **Statement of Work (SOW)**
Duration: **4 weeks (from the beginning of the project kick-off = the Orientation day)**
Reading(s): **SOW Template (available online)**

Action Items

1. Team discussion with Endeavour Client Selection Committee member
2. Informal conversations with your key client contact
3. Define the problem and build initial hypotheses and plan to tackle the project
4. First formal client meeting - with the whole team, the advisor(s) and the Endeavour Client Selection Committee member.
5. Preliminary data gathering (e.g., client process documents, board structure, financial statements etc.)
6. Develop Statement of Work (SOW)
7. Sign off on the SOW by the client and both advisors assigned to the team

The exact order and timing in which this takes place will vary and depend upon the completeness of the client information form, the client's availability for the meeting, etc.

<u>Deliverable – Statement of Work (SOW)</u>

1. Initial Overview

Include a basic understanding of the client: ownership and management, organization structure, financial performance and current situation, and a preliminary estimate of its apparent capabilities.

2. Preliminary Assessment

Hypothesize as to what appear to be the important strategic issues, (the major elements which will determine the client's success or failure). Refine this to develop your project objective.

3. The Research Plan

The research for this assignment may be thought of as being comprised of a number of projects, each answering a specific question. It is advisable to review the research plan with the client. This helps the organization appreciate what is required of them and better understand what they can expect from the team at the conclusion of the assignment. Familiarity with the potential benefits of this work usually encourages the client to be more cooperative and more forthcoming with the confidential data that the consulting team requires. At a minimum the research plan should contain:

- Specific questions to be researched in Phase 2A.
- Sources of information you expect to use, for example, interviews with Executive Director (ED), managers and staff; financial statements, interviews with customers, surveys of customers; search of literature, government reports, etc.
- Estimated time required with expected completion dates.
- Specific responsibilities and tasks of the team members and the time allocated.
- Tentative hypotheses: answers that you initially expect to derive from this research.
- Priorities for the specific research projects, based on estimates of the time and work required to develop the data, as well as on assessments of the probable usefulness of these answers in addressing the major issues which have been determined.

<u>The Phase 1B Meeting with Advisor(s)</u>

This meeting is to discuss the overview and preliminary assessment of the situation and to approve the research plan that will guide the research activities of the team during the first half of the assignment. The advisor(s) may also comment on the hypotheses provided in the SOW, highlighting those aspects of the environment, the competitive setting or particular aspects of the client's situation that they feel would be important in this phase. The meeting creates a unique opportunity for you to dialogue with your advisor(s), raise questions, and agree on the next steps.

Meeting Objective

- Give your advisor(s) an understanding of the client and its operating model.
- Review scope, and resolve any issues about client and scope of study.
- Discuss preliminary strategic assessment of the client, to identify areas for research.
- Clarify the team's research plans for Phase 1B: Data Gathering. Are the questions or issues addressed in the research plan appropriate? Have suitable priorities been assigned to the various aspects of the work? Do the specific projects contained in the research plan look to be practical and can be expected to yield the results anticipated?
- Set the date for the next meeting.

PHASE 2: RESEARCH PLAN EXECUTION

The activities that make up Phase 2 of the consulting engagement centre on executing the activities in the Statement of Work developed in Phase 1.

PHASE 2A: Data Gathering

Deliverables: **Research Appendices**
Brief Progress Report
Duration: **1 – 2 months**
Reading(s): **Analytical Tools Guide (available online)**

Action Items

1. Develop interview questionnaires, surveys, frameworks for analysis of data
2. Conduct data gathering: set up interview appointments, send out surveys, research

This phase will determine the quality of the project. Without a solid understanding of the situation, including both internal and external aspects, the final report will lack conviction and credibility. Clients are not impressed by the unsupported opinions of a team. The team's conclusions must rest on facts, and it is the goal of Phase 1B to collect those facts that are crucial to a clear understanding of the client and the issues facing the organization. However, data collection should not overwhelm the purpose of the engagement. Collecting data is part of a search for answers in order to understand the strategic situation of the client.

Deliverables

1. Research Appendices

Executing the research plan (identified in Phase 1A) will yield vast amounts of data that must be analyzed (see the outline provided under **7 Easy Steps to Maximize Workshop Effectiveness** – an optional method to gather data). This section reports the results of your research. Since it is likely that many elements of this research will constitute the appendices of the final deliverable, it is advisable to prepare each with some care. See the **appendices guideline** on how to structure your appendices.

Typical appendices should cover topics such as the market of the customers; competitors; technology; a detailed and thorough overview and review of the client, its history, aspirations, organizational structure, activities, capabilities; a financial analysis, including forecasts, review of costs, revenues, assets, capital, financing; grant and regulatory issues.

2. Progress Review

At the outset, the team made a preliminary assessment of the client and its market/competitive environment. Now, with the benefit of further research, the team should be able to render its assessment of the situation. Mindful of the end product of the assignment, the team should attempt to assess its progress to date, and, if necessary, make appropriate adjustments to the original plan.

The Phase 2A Meeting with Advisor(s)

The Phase 2A meeting is about executing the research plan. At this stage, the team should ask itself is the existing information adequate? Do we need additional research and/or analysis? The team is encouraged to form opinions about the assessment of these data and should discuss these ideas at the meeting. This introduces the work to be done in Phase 2B: Analysis of Data.

Meeting Objective

- To clarify any outstanding scope issues from Phase 1B.
- To review research progress as per the research plan.
- To identify gaps in information or ability to complete the assessment phase.
- To discuss the team's view of what the research means for the organization's choices, strategy, and possible recommendations — test whether the five questions are getting addressed.
- To discuss how the team is working

PHASE 2B: Analysis of Data

Deliverables:	**Preliminary Report** **Appendices**
Duration:	**1 – 2 months**
Reading(s):	**Sample Reports on Knowledge Management Repository** **Analytical Tools Guide**

Action Items

1. Determine suitable frameworks within which data is to be analyzed
2. Formulate a diagnosis of the health of the organization and strategic issues it faces
3. Determine the implications of data gathered to the strategic goals of the client
4. Develop alternatives that client can take to address key issues

Phase 2B is a logical conclusion of the data collection phase; it is designed to provide an opportunity to view the research findings as documentation and support for the assessments and conclusions that the team believes to be important for the future of the organization.

Deliverables – Preliminary Report

The preliminary report should expand on the following. Review sample reports and client presentations found on the Knowledge Management Repository:

1. Conclusions about the client's prospects and key issues

The team must concentrate on the conclusions and implications of the research, now largely completed. Identify the key issues. The situational assessment flows directly from the research and puts the strategic question in focus: What evidence from the research is now available to support this conclusion? The emphasis is not only on reflecting and explaining past conditions but, most importantly, understanding and critically assessing the organization's prospects in the future. What is the significance of all this for the future of the organization?

2. The financial health of the organization

A key component of an organization in the non-profit world (or otherwise) is its financial health and related implications. To that end, a financial model is essential. Designed to cover the forecast period, usually 3-5 years, the model establishes a base case (often called the status quo scenario) which is developed on the assumption that the organization will continue very much as it is at present and the projections show the probable financial results of that scenario.

3. Research Appendices - See the outline provided under Appendices

Typical appendices should cover topics such as the market of the client's target population(s); competitors; technology; a detailed and thorough overview and review of the client, its history, aspirations, organizational structure, activities, capabilities; a financial analysis, including forecasts, review of expenses, revenues, assets, capital, financing; grant and regulatory issues.

The Phase 2B Meeting with Advisor(s)

At this meeting, the team will present its assessment of the situation and preliminary recommendations and conclusions. The advisor(s) may comment on the validity and soundness of the conclusions made and make recommendations for improvement where warranted.

Meeting Objectives

- Review the team's assessment and conclusions.
- Provide suggestions and feedback on additional work to fill in holes in the analysis.
- Discuss key issues, options, and directions warranting investigation in the next phase.
- Clarify expectations for client presentation or contact.

PHASE 2C: Recommendations

Deliverables:	**Final Report** **Appendices**
Duration:	**1 month**
Reading(s):	**Sample Reports on Knowledge Management Repository** **Analytical Tools Guide**

<u>Action Items</u>

1. Further develop alternatives and implementation plan
2. Transform the preliminary report developed in the previous phase to the final document

The following are guidelines to assist you in preparing your final report:

- The final report consists of a body of text presenting an argument and a series of appendices supporting the team's assessment and recommendations.
- Include an Executive Summary
- A comprehensive reference list of all sources used for the study lends credibility to the report.
- Use charts, tables within the body, where appropriate, or at the end of each section. Don't place critical graphics or charts in the back when they need to be referenced in order to follow your argument.
- Combination of paragraph and point form encouraged. Descriptive highlights can be displayed on charts, or in point form.
- Ensure writing is crisp, clear and concise. Simplify the point wherever possible.

<u>Deliverables – Final Report</u>

1. Alternatives and Recommendations

What recommendations can be made to improve the future outlook? There are always alternatives; determine which are likely to improve the future outlook. Look for alternatives that are comprehensive, mutually exclusive, make a significant and sustainable difference.

Evaluate the alternatives/recommendations using well-defined criteria and select the most appropriate option. A critical component of your argument must address the reasons for taking action: Why should the organization alter its present course? Why is the selected alternative the best possible strategic direction for the organization to take?

2. Implementation Plan

The details of implementation must be developed. Strategic recommendations are meaningless unless they can be translated into specific programs of action. Usually, factors such as the financial capability, the other resources available, risk, expected competitive reaction, time constraints, the power structure, and the fit with personal values must be addressed. The elements of this plan of implementation should be:

Consistent - There must be a logical connection with the proposed strategy.
Specific - Broad, general statements about the need for improvement are seldom sufficient. The more specific the suggestions, the more useful they will be to the client.
Realistic - The organization must be capable of doing what is recommended.
Financially advantageous - The costs and potential returns must be quantified.
Scheduled - A schedule must be prepared to show the timing of this plan.
Prioritized - A sense of priorities is always necessary for it is not possible to do everything.

3. Financial Implications

The principal argument supporting the proposed strategic plan is based on the expected financial performance. Clearly, the report must document financial advantages for the client. Compared to the base case (or status quo) model, the financial results that can be expected in the proposed plan are often the most convincing argument supporting the suggestions for change.

4. Appendices - See the outline provided under Appendices

<u>The Phase 2C Meeting with Advisor(s)</u>

Meeting Objectives

- Review any revised research and analysis on the strategic assessment of the organization.
- Assess the suitability of the strategic recommendation especially in contrast to the alternatives.
- Assess the strength of the supporting arguments, including the financial and other implications for the organization.
- Assess the adequacy of the elements required to implement the recommended plan.
- Review the report, focusing on those aspects of the argument and the document that needs improvement or embellishment.
- Clarify expectations for the final presentation.

PHASE 3: CLIENT DELIVERABLES

Deliverables: **Final Client Presentation and Final Report**
Duration: **1 month**
Reading(s): **Sample final client presentations on Knowledge Management Repository**

The activities that make up Phase 3 of the consulting engagement centre on handing-off the deliverable(s) to the client. Key activities specific to Phase 3 are:

- **Final Deliverable(s):** The consulting team delivers to the client a report and/or presentation deck summarizing the problem, methodology, key findings, strategic options, recommendations and evaluation metrics.

- **Final Client Presentation:** The consulting team makes a final presentation to the client, highlighting the key recommendations and next steps. An Endeavour executive attends the final client presentation.

Delivering the final document (report, presentation or another format) to the client marks the conclusion of your engagement. A presentation to the client's senior management should take place within two weeks of the Phase 2B meeting. The final deliverable represents the payoff to the client, for their cooperation during this process.

Key **requirements** for this phase are:

a) **An Endeavour executive and advisor must be invited to the presentation**
b) **The final presentation must be uploaded on to the Knowledge Management Repository**
c) **A Project Close-out form must be completed a week after your Final Client Presentation (the form will be sent to the EM by your assigned Project Manager)**

7 EASY STEPS TO MAXIMIZE WORKSHOP EFFECTIVENESS

A workshop is an opportunity to bring together client stakeholders who are involved in decision-making and/or potentially impacted by your project recommendations while validating secondary research findings and gaining buy-in on certain ideas. It may also bring to light existing strategies, methods, or solutions that internal members of the client organization do not agree upon. A workshop conducted within the first two months of an engagement is useful for primary research, while a workshop conducted later on may be used to collect feasibility and prioritization feedback on initial recommendations and implementation strategies.

Set your team up for success by establishing a framework which directs everyone toward a common set of workshop goals and project objectives. Define the following seven key factors in your workshop plan, to maximize the effectiveness of your workshop:

1. Workshop Goal

Identify the objectives of the workshop and define what is in scope and what is out of scope

Questions to address as a team: What are you trying to achieve? What information and insights are you hoping to gather from the workshop?

2. Audience

Define the required participants for the workshop based on its purpose

Question to address as a team: Which stakeholder(s) should you ask the client to invite to the workshop - board members, full-time staff, and/or volunteers?

3. Exercises

Choose exercises that are tied to the key deliverables of the project [Refer to **Appendix A** for Sample Exercises & Activitiies]

Assign a facilitator to each exercise (someone that aims to pull out themes and summarize key ideas)

Questions to address as a team: What activities will you complete during the workshop? How will these activities help achieve the workshop objectives, and ultimately the project objectives?

4. Team Roles

For each exercise, assign a lead, facilitator, time-keeper, and note-taker [Refer to **Appendix B** for Team Member Roles]

5. Workshop Rules

Define and agree on the rules of the workshop as a team [Refer to **Appendix C** for Sample Workshop Rules]

Question to address as a team: What policies and procedures should be followed during the workshop to ensure it is effective?

6. Facilitation Approach

Determine the facilitation techniques and approach [Refer **Appendix D** for Facilitation Techniques & Approach]

7. Workshop Agenda

Determine the workshop agenda based on the client's feedback [Refer **Appendix E** for Workshop Agenda Guidelines & Sample Workshop Agenda]

Send a copy of the agenda to the client 1-2 weeks in advance

Question to address as a team: What will the agenda look like?

Appendix A: Sample Exercises & Activities

Exercise	Activities
Mission statement	• Identify the cause, action and impact • Exercise: https://prosper-strategies.com/nonprofit-mission-statements-the-ultimate-guide/ • Examples: https://wiredimpact.com/blog/10-effective-nonprofit-mission-vision-pages/ • Value proposition: https://www.nonprofitmarketingguide.com/creating-a-unique-value-proposition-for-your-nonprofit-part-1/
Program prioritization	• Develop criteria and prioritize/rank programs
Brainstorm with Venn diagrams and sticky notes	• Understand what your 2-3 circles are and find intersection points (i.e., organizational strengths, market needs, and funding opportunities)

Appendix B: Team Member Roles

Role	Responsibilities
Lead	● Runs the activity and sets themes for discussion ● Summarizes key points and moves conversations to the next step ● Brings break out groups (if applicable) back together for larger discussion ● Can float between different break out groups to understand differer conversations
Facilitator	● Facilitators are important for breakout groups ● One Endeavour volunteer should be assigned for each breakout group ● Steers conversations ensuring participation from all attendees ● Prevents more vocal participants from 'hijacking' the discussion
Timekeeper	● In charge of keeping the session on track ● Must have the ability to end conversations and keep workshop on schedule
Note-taker	● Documents all conversations so that team has ample data to work with

Appendix C: Sample Workshop Rules

1. One person speaks at a time
2. Avoid side conversations
3. Stay on topic (Facilitators can rein in the discussion by adding items to a "Parking Lot" board)
4. Respect others' points of view
5. No idea is a bad Idea
6. Write all ideas down, even if you disagree with your team member
7. Confidential issues will remain in the room

Appendix D: Facilitation Techniques & Approach

1. Facilitation Hats: Each participant (or the facilitator) wears a different hat. For example, the blue hat is processed, green creativity, black negativity, yellow positivity. The idea is to bring different perspectives to the table and allow participants to voice opinions without judgement or concern. Link: https://www.tsw.co.uk/blog/leadership-and-management/six-thinking-hats/
2. Open Form (traditional): Candidates are open to discuss their opinion and run through the exercise without a specific role. This requires a strong workshop facilitator who will:
   - Intervene if the discussion starts to fragment
   - Identify and intervene if the conversation gets off track

- Summarize a few key ideas throughout the discussion and at the end of the workshop
- Ask open-ended questions to promote participation
- Challenge ideas and ask why
- Prevent dominance and include everyone
- Bring closure to the meeting with an end result or action

Appendix E: Workshop Agenda Guidelines & Sample Workshop Agenda

- Determine the flow of the workshop
  - Introduce the Endeavour team and allow time for participants to introduce themselves as well
  - Provide a brief background of Endeavour and the project, including the team's understanding of the organization and the problem definition
  - Define the workshop purpose and goals
  - Define what's in and out of scope
  - Set rules for the workshop (no interrupting, be open-minded, etc.)
  - Leave lots of time for breaking off into groups and having smaller discussions
  - Close off with enough time for thoughts and reflections
  - Clearly lay out the teams' next steps
- Once the team has agreed upon an agenda, request client feedback on the agenda

Sample Workshop Agenda:

Activity	Duration
Introductions	10 minutes
Background: Problem definition	5 minutes
Meeting purpose & objectives	5 minutes
Workshop guidelines, roles and scope	5 minutes
Exercise 1: Revise mission statement part I	35 minutes
Exercise 2: Brainstorm strengths, gaps and opportunities	35 minutes
Exercise 3: Categorize organization's key activities	20 minutes
Break	10 minutes
Exercise 4: Revisit mission statement part II	15 minutes

Exercise 5: Prioritize activities	35 minutes
Questions & Closing Remarks	10 minutes

Tips & Tricks

- ✔ Ask participants to come prepared – is there anything they can prep before-hand to save time?
- ✔ Ensure time is monitored to keep everything on track
- ✔ Give time for participants to take a break

Appendix F: Subject Matter Expert (SME) Request Form

Client	
Client Background	
Project Objective	
The specific problem that needs to be addressed by the SME	
Description of expertise required from the SME	
Timeline within which the SME needs to complete the work or provide guidance on	

Any other information that may be relevant	

THE APPENDICES

Appendices are the section of the report where relevant research data are presented and analyzed. The appendices provide the evidence to support the arguments and recommendations in the body of the report. They consist of relevant data that are gathered throughout the life of the project.

The material that appears in the appendices should be referred to in the body of the report. Much of the detailed analysis and reference evidence should be placed in appendices. Do not include raw data, unless it serves a specific purpose. If you have compiled data that is not referenced in the body of the report, it probably should not appear in the appendices. The appendices will change as the team proceeds through each phase. What may have been a relevant appendix in Phase 1A or 1B may not be relevant in Phase 2B.

Appendices should flow with the body of the report (i.e. if the organization overview is first in the report, data related to it should constitute the first appendix). The front page of every appendix should have a summary cover page (bulleted list) that identifies:

- Purpose
- Sources of Data
- Key Findings (**NOTE: the Key Findings are NOT a summary of the data but a description of its implications to the client**)

This format provides the advisor(s) with a quick summary of the appendix and highlights the key points relevant to the report. There is no limit to the number or size of appendices. As a basic guide, the list of appendices should at least include:

- sector size and trends, including technological developments if relevant
- target group analysis: priority population(s) and communities being served, including their diversity and demographics
- financial analysis
- competitor/substitutes assessment
- market segment analysis
- internal organizational analysis

INTERVENTION GUIDE

The guide is designed to provide you with some suggestions on the areas of consideration when handling interpersonal challenges that you may encounter throughout your consulting engagement. Some possible issues are loosely classified in categories of which you may come across involving a) you only, b) the engagement manager (EM) only, c) the team as a collective, d) the clients, e) other supporting resources such as the project advisors, the subject-matter-experts, and/or the executives.

PERSONAL ISSUES

Situation	Reactive intervention suggestions (The situation is unfolding.)	Proactive intervention suggestions (You can see the situation coming.)
• You can no longer fulfil your commitment to Endeavour because of changes in your personal situation	• Be honest with your team and explain the situation as soon as possible so that your responsibilities may be modified according • Inform your Endeavour Project Manager or the Director of Project Management	• Discuss with your EM whether you should remain on the project team or not • Take on tasks that will require fewer collaborations and meetings
• You want to do more than everyone else on the team	• Make sure that you are not unintentionally taking away other's responsibilities and that the team is comfortable with this seemingly uneven distribution of responsibilities	• As long as you are being honest with yourself that you have both the time and the abilities to take on more, then just be mindful that you are not doing so at the expense of diminishing other's developmental opportunities and experience by joining Endeavour
• You took on more than you can handle and want to give some of it back to others on the team	• Raise this issue with the EM early on and discuss the best way to re-distribute your responsibilities	• Remember that 5-10 hours of volunteering time over 6 months is loosely equivalent to the load that one can handle in an intense 2-week school project • Be realistic about your availability to tackle the tasks so that you will not be letting your team down later on in the engagement
• You and another team member just cannot get along	• Remain professional and stay objective in contributing constructively to the well-being of the client – you do not always get to choose your team members in real life	• Try your best to see things from the perspective of this other member and operate under the assumptions that everyone is just trying to do what they think will be best for the client

ISSUES WITH THE ENGAGEMENT MANAGER

Situation	Reactive intervention suggestions (The situation is unfolding.)	Proactive intervention suggestions (You can see the situation coming.)
• Your EM is not doing any work	• Keep EM in the loop and lean heavier on the guidance of the Senior Consultant to keep the project moving • Escalate to your Advisor or Endeavour Project Manager or the Director of Project Management if necessary, and consider reviewing the 'Volunteer Dismissal Guidelines' (if an ongoing issue)	• Talk to the EM to understand why he/she is not as engaged as expected • Escalate to your Advisor or Endeavour Project Manager or the Director of Project Management if necessary, and consider reviewing the 'Volunteer Dismissal Guidelines' (if an ongoing issue)
• Your EM is not fair when dividing up the work	• Suggest that the subproject lead (or "work stream prime") will divide up the work to its subproject (or work stream) members	• Encourage the team to share with EM the type and the amount of work that each member would like to have
• Your EM has an unrealistic expectation on the project scope or your time commitment	• Discuss with the EM on how to set some of the deliverables as stretched goals to ensure that the must-have's can be delivered with high quality	• Suggest that team members should agree on the SOW before signing with the client
• Your EM is acting as an independent consultant with the client and not engaging the rest of the team as much as s/he should be	• Reach out to your Advisor or Endeavour Project Manager or the Director of Project Management to discuss the situation • Avoid engaging the client directly without the EM when you are waiting for guidance from Endeavour executives; Endeavour must be seen as one team in front of the client	• Request to discuss how to divide up the client engagement responsibilities at the next team meeting • Seek and understand whether the EM is trying to avoid overwhelming the client with too many Endeavour consultants until at a later stage of the engagement

ISSUES WITH THE TEAM

Situation	Reactive intervention suggestions (The situation is unfolding.)	Proactive intervention suggestions (You can see the situation coming.)
• One team member is not pulling his/her weight and it has become noticeable by others	• Ask this team member to either share or offload his/her responsibilities with others on the team ASAP • Consider reviewing the 'Volunteer Dismissal Guidelines' (if an ongoing issue)	• Try to understand whether this team member is "stuck" because s/he needs more guidance or s/he has other things going on in his/her life • Consider reviewing the 'Volunteer Dismissal Guidelines' (if an ongoing issue)
• Most members on the team are undermining the ability of the EM	• Do not add to the discord by taking sides • Seek help from your Advisor to facilitate a session with the team – including the EM – to air out all outstanding issues • Escalate to your Endeavour Project Manager or the Director of Project Management if necessary	• Have a chance to do a round table early on in the engagement cycle for everyone to highlight their strengths and weaknesses so the team can cover for each other
• Half the team wants to modify the project scope while the other half is hesitant and/or showing resistance	• Assess objectively on the impact to the project, to the client, to the project team, to the Endeavour brand before making a final decision to change the project scope • Seek help from your Advisor or Project Manager or Director of Project Management	• Discuss and agree that the SOW should only be sign offed with the client when the team collectively is satisfied with the scope
• Someone is hogging all the face-time with the client at meetings	• During the meeting, have the EM take the lead in moving onto the next agenda item; if it is the EM hogging the airtime, the senior consultant to step in • After the meeting, the team should debrief on how the time slots were divided up at the meeting	• Plan out the flow of a client meeting prior to the actual meeting • Identify a time-keeper for the meeting because going over-time on one section will take time out of other parts of the presentation

• Your team cannot reach consensus	• Seek guidance from your Advisor • Let the EM/senior consultant make the final decision or try voting	• Understand that not all decisions need to come to a consensus; sometimes the solution “in the middle” is, in fact, the most suboptimal solution
• Two weeks before the final client presentation, your team realizes that the deliverables cannot be delivered	• Before extending the timeline of the project, assess objectively the impact to the client, to the project team, to the Endeavour brand before making a final decision to change the project scope • Seek help from your Advisor or Project Manager or Director of Project Management	• Reach out to the subject matter expert resources early on in the engagement cycle • Establish regular milestone check-ins and status updates with the client

ISSUES WITH THE CLIENT

Situation	Reactive intervention suggestions (The situation is unfolding.)	Proactive intervention suggestions (You can see the situation coming.)
● The client has doubts about the team's ability to solve their challenges	● Assure the client that the team has access to Advisors who are senior experts in Management Consulting, Non-Profit or Government area and also subject matter experts (SMEs) in many subject areas ● Arrange for SMEs and/or your Advisor to join the client meetings ● Establish more frequent check-points with the client to demonstrate progress	● At the first client meeting (and even the introductory email), demonstrate to the client that your team is knowledgeable and organized (Advisors, SMEs, meeting minutes, etc.)
● The client is not providing information to the team causing a bottleneck in the work plan	● After repeated attempts to get the information, the team should escalate this to their Advisor and Endeavour Project Manager or Director of Project Management for assistance	● Build in the buffer for the client being late on sharing information ● Include a dependency in the SOW that the client is to provide information in a timely manner for the project to progress as outlined in the work plan
● The client wants to change the direction of the project mid-way through the engagement	● Explain the benefits of not changing the project – use risk aversion technique ● Seek help from your Advisor or Project Manager or Director of Project Management	● Set expectation with the client during the SOW process that a 6-month volunteer engagement will be difficult to change course mid-way through

ISSUES WITH OTHER ENDEAVOUR RESOURCES

Situation	Reactive intervention suggestions (The situation is unfolding.)	Proactive intervention suggestions (You can see the situation coming.)
• Your advisor is always too busy to participate in team meetings	• Proceed with the engagement leaning more on support from your Endeavour Project Manager and alternatively request subject matter experts • Escalate ongoing issue to your Endeavour Project Manager or Director of Project Management	• Make arrangement for the advisors to be involved offline (via email) if s/he is too busy to join team meetings
• Your advisor is too dominating at meetings	• Ask the EM to arrange "working sessions" of which the advisor needs not to be there	• Express your concern to the EM; the EM should, in turn, discuss the situation with the advisor or raise the issue with your Endeavour Project Manager or Director of Project Management
• The team is having challenges to get a hold of the subject matter expert (SME)	• Ask your Advisor and/or Endeavour Project Manager or Director of Project Management to help identify other SMEs in the same subject area	• Start reaching out to the SME early on in the engagement cycle

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The following resources were invaluable in the preparation of this toolkit:

- Endeavour Volunteer Consulting for Non-Profits (Endeavour)
- Round 8 Training Module by Sarah Farrugia
- Strategy Field Study Guide, Schulich School of Business
- The Internal Consulting Team (2011 – 2012), Endeavour Volunteer Consulting for Non-Profits