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OneSource Consulting Services Workflow Process Responsibilities Charts, January 2019

Formerly Executive Service Corps of Cincinnati (or ESCC)

PRE-PROJECT PHASE: RESPONSIBILITIES: *DEFINITION THROUGH CONTRACT* **STAFF*, PROJECT ASSESSOR (PA)**, PROJECT MANAGER (PM)** **Files: Project Definition Report (PDR), Scope of Services (Scope), Consulting Agreement (CA), Signed Consulting Agreement (SCA)**			
PROJECT ASSESSOR (staff assigned)	**PROJECT MANAGER** (staff assigned)	**STAFF**	**Administrative**
*(Project Definition Report)****	*(Scope of Services)****	*(Consulting Agreement)****	*(Documents)****
• DEVELOP PROJECT • ASSIST STAFF IN ENGAGING PM • PREPARE FOR & ATTEND DISCOVERY MEETING • COMPLETE PROJECT DEFINITION REPORT • ASSIST PM IN COMPLETING PROJECT SCOPE • ASSIST STAFF IN DEVELOPING CONSULTING AGREEMENT (AND IN REVISING, IF NEEDED)	• PREPARE FOR & ATTEND DISCOVERY MEETING WITH PA • ASSIST IN DEVELOPING PROJECT SCOPE • COMPLETE PROJECT SCOPE • REVISE SCOPE, IF NEEDED • PROVIDE INPUT ON TEAM COMPOSITION PRE-SCA • POST SCA, COORDINATE WITH M-VS FOR TEAM COMPOSITION	• RESPOND TO LEAD • ASSIGN PA (FROM LEAD, RFA OR FIRST CONTACT WITH POTENTIAL CLIENT) • SELECT & ENGAGE PM (ALERT M-VS TO START TO IDENTIFY POTENTIAL TEAMMATES) • DEVELOP CONSULTING AGREEMENT (INCLUDING DETERMINING PROJECT FEE AND GRANT, IF APPLICABLE) • SEND CONSULTING AGREEMENT TO CLIENT FOR QUESTIONS, REVISIONS AND APPROVAL • WHEN SCA RECEIVED, NOTIFY PM, M-VS AND AA CONFIRM PM • M-VS RECRUITS TEAMMATE(S)	• START PROJECT DEFINITION REPORT (PDR) AND SCOPE OF SERVICES DOCUMENT • PREPARE CONSULTING AGREEMENT (CA) • ARCHIVE SIGNED CONSULTING AGREEMENT (SCA) • SET UP IN QB, INPUT TRACKING DATA, SEND FIRST INVOICE • POST SCA, CREATE THE FOLLOWING AND ARCHIVE FOR LATER ACCESS: - APPROVED SCOPE - MIDTERM BLANK - FINAL REPORT BLANK ARCHIVED FILES MAY ALSO BE FILED IN VOLUNTEER RESOURCES ON OS WEBSITE *(TO BE DEVELOPED)*

Staff includes: CEO; Director, Consulting Services (D-CS); Manager, Consulting Services (M-CS); Manager, Volunteer Services (M-VS); and Administrative Assistant (AA). ** Project Assessors include appointed volunteers as well as staff. * Key deliverable responsibility.*

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RESPONSIBILITIES **PROJECT PHASE:** *PROJECT PLAN, MIDTERM,FINAL REPORT* **STAFF*, PROJECT ASSESSOR (PA)**, PROJECT MANAGER (PM)** **Files: Project Plan, Midterm Check-in, Addendum (if needed), Final Report**	
PROJECT ASSESSOR FORMAL RESPONSIBILITIES END WITH SCA, BUT PA MAY CONTINUE AS RESOURCE TO PROJECT MANAGER (OUTSIDE PROJECT MEETINGS); ALSO MAY BE INVOLVED IN ADDENDUM DEVELOPMENT IF APPROVED SCOPE CHANGES.	
PROJECT MANAGER	**STAFF**
*(Project Plan, Final Report)****	*(Midterm Check-in, Addendum, Final Report)****
• ASSEMBLE PROJECT TEAM • COORDINATE WITH PROJECT TEAM TO DEVELOP PROJECT PLAN • LEAD PROJECT AND SERVE AS PRIMARY CLIENT CONTACT • RESPOND TO STAFF MIDTERM CHECK-IN (D-CS, M-CS) • PROVIDE SCOPE OF ADDENDUM, IF NEEDED, TO STAFF • AT FINAL PROJECT MEETING, GET CLIENT CONCURRENCE THAT PROJECT IS COMPLETE (OR DETERMINE WHAT IS STILL NEEDED) • DRAFT FINAL REPORT AND SEND TO STAFF FOR INPUT AND APPROVAL	• COORDINATE WITH PM AS NEEDED • CHECK IN WITH PM AT MID-TERM AND COORDINATE WITH PM TO RESOLVE ANY NEEDS OR ISSUES • IF NEEDED, ASSIST PM IN DEVELOPING ADDENDUM • PROVIDE FINAL REPORT FORM (WITH TOP COMPLETED) TO PROJECT MANAGER TO DRAFT FOR CLIENT APPROVAL • APPROVE FINAL REPORT, SEND TO CLIENT FOR APPROVAL AND COMMENT • AFTER CLIENT RESPONSE, SEND FINAL INVOICE

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RESPONSIBILITIES **POST PROJECT PHASE:** *TEAM CRITIQUE, CLIENT EVALUATION, FOLLOW-UP, IMPACT STUDY* **STAFF*, PROJECT ASSESSOR (PA)**, PROJECT MANAGER (PM)** **Files: Team Critique, Client Evaluation, Follow-up Notes, Impact Study Report, Scope**	
PROJECT MANAGER	**STAFF**
*(Team Critique, Six Month Follow-up)****	*(Client Evaluation, Six Month Follow-up, Impact Study Report)****
• COORDINATE (INVITE PROJECT CONTRIBUTORS) AND ATTEND TEAM CRITIQUE • DRAFT TEAM CRITIQUE AND SEND TO STAFF • SHARE CLIENT FEEDBACK WITH ALL PROJECT TEAM CONTRIBUTORS • PARTICIPATE IN 6 MONTH FOLLOW-UP (OPTIONAL - COORDINATE WITH STAFF) • PARTICIPATE IN IMPACT STUDY, IF NEEDED (STAFF TO DETERMINE)	• ATTEND TEAM CRITIQUE (OPTIONAL) • COORDINATE 6 MONTH FOLLOW-UP (ATTENDANCE IS OPTIONAL) • SEND CLIENT EVALUATION AND INVOICE TO CLIENT • SHARE CLIENT FEEDBACK WITH PA, PM AND TEAM • ARCHIVE FILES ON SERVER • PARTICIPATE IN FOLLOW-UP IF NEEDED • DIRECT IMPACT STUDY FOR SELECTED PROJECTS (NO SOONER THAN ONE YEAR AFTER DISENGAGEMENT FROM CLIENT) • COMPLETE PROJECT TRACKING AND FILE ARCHIVING

Staff includes: CEO; Director, Consulting Services (D-CS); Manager, Consulting Services (M-CS); Manager, Volunteer Services (M-VS); and Administrative Assistant (AA). ** Project Assessors include appointed volunteers as well as staff. * Key deliverable responsibility.*