Discussion:

1. Share with us three adjectives related to your project, one on the positive side, one about a challenge, and one of your choice

2. Propose and prioritize topics for discussion
   A. Team member seems out of their element
   B. Shrinking team
   C. How to give bad news
   D. How to respectfully disagree within the team

3. Discuss high priority topics (notes will be taken and emailed to everyone)

   **Topic A: Team member seems out of their element.**
   One team member isn’t capable of creativity, of connecting the dots.

   **Idea/solutions:**
   - Focus them on a specific task: the analytics, etc
   - In the first team meeting, have a conversation with your team around
     - What do you have to contribute?
     - What are you passionate about doing or contributing?
   - Pair a weaker person with another person into a 2-person task team. Or pair the weaker person with the project leader
   - To the extent they are dysfunctional within the team, sit down and have a one on one conversation with them.
   - If they seem intimidated, as a project leader:
     a. Be sure and solicit everyone’s feedback
     b. Ask each person what they are passionate about doing or contributing
     c. Ask them to do operational things like the minutes
   - Call Susan as a resource for brainstorming (Susan commented, “these people can easily bring down a team due to their lack of ability, so it can be tricky, please use me as a resource.”)
   - Letting Susan know is important for ACT. She can help to get them in the right place within the team, get them off the team and can let future project leaders know, so they have a choice as to taking that person on a team.

   **Topic B: How to give bad news**

   **Idea/solutions**
   - Give the news to the ED first, before giving the news to the client at large
   - Think about including a few additional members from the client in the heads up so that key stakeholders are not surprised, such as Board members or Department heads
   - Including Board members or the Board Chair can ensure that the nonprofit ED and staff understands it
• Conversely, you may choose to save Board involvement until the end of the project so the ED has a chance to course correct
• Enlist the client to resolve the issue and to determine the best way to move forward. Example of verbiage to use: “I/we have misgivings ….. How do we move forward constructively in the second half of the project.
• Be very specific and very objective so the client doesn’t start to dissemble
• Take into account the ACT team members. If they are being asked to pursue something bogus, it can bring the morale down quickly.
• Go to the client as early as possible. So for example, if you have lost 2 of 5 team members go to the client and let them know you can’t do the project they way it is scoped.

**Topic C: How to respectfully disagree within the team**
(We used the ACT Creative Perspectives Card Deck)

Idea/solutions
• There is a spectrum
  Fully engaged dialogue ←-----------------------------→ Shouting

• Q: What would a five year old see? Say? A: ask that the team members take turns talking
• Q: Look at the issue/situation/problem from the client’s perspective. What would that look like? A: we hope that there is healthy dialogue, and also that the team is able to come together so that we don’t see the “behind the scenes” disputes
• Q: Look at the issue/situation/problem from the busiest person on the team’s perspective. What would that look like? A: Tell me quickly what you think, let’s hear it and move on
• Q: What would a for profit company do in this situation? A: Let’s agree to disagree, then commit to a direction.
• Q: “Rules are meant to be broken” What rules can you break? A: Instead of “putting an issue to bed”, break the ratcheting tension and say OK, let’s agree to move on.
• Q: What would a person you respect do? A: Vince Forte, a project leader, has term he used called “the Groan Zone” and he would tell the team that we are going to be sure all team members agree even if it means seeming to be inefficient by dwelling on the obvious and repeating ourselves.
• Q: Look at the issue/situation/problem from the “problem” personality’s viewpoint. What would that look like?: Use verbiage like “I see it very differently”
• Q: What are 5 different ways you can ask a clarifying question? A: this is very good for a project leader to use.
• Q: What are you forcing? Where could you ease off? A: As a project leader, draw out each team member’s perspective with questions.
• Remember the old adage: You can do it yourself (FAST) or you can leverage the collective knowledge of your team (FAR)
• As a project leader, be aware of the way people think and they way they make decisions

**Related topic:** if there is a disagreement, is it the leader’s call to settle the dispute?
Ideas/Thoughts:
- The project leader should drive consensus if consistent with the scope of the project.
- If it becomes bi-directional, then the project leader reconciles it and then defines the path.
- The team could present the dissenting opinion.

Related topic: what if one or more people disengage after a toe-to-toe disagreement?
One team member may defer, then withdraw or disengage. Or the opposite can happen when there is a team member who has done it before and is not open to doing it or thinking about it another way.

Ideas/Thoughts:
- Take it off line and speak to each team member

Topic D: A shrinking team

Ideas/Thoughts:
- Let the client know early
- Be open to re-scoping the project to be in line with resources
- Over-staff the team from the beginning
- Think about a client volunteer as a replacement
- Keep Susan informed - she can sometimes help with a replacement team member, a back-up volunteer team member
- Ask the client if there is someone they want to assign. Some project leaders always ask the client to assign a volunteer to the project team; a joint project team can be very strong.
- Make it clear up front in the first team meeting that volunteers need to communicate with project leader on a regular basis
- Acknowledge that people’s lives do change, but impress upon the volunteers that it is important to communicate any changes in the time they have available for the project as soon as possible.
- It helps to be positive and reinforce the specific value-add they bring to the team – “we are dependent on you to do x”
- Project leader can work with the client to figure out what this does to the project, what this does to the project schedule, what it does to the scope, to the implementation.
- Think hard about if it makes sense for the team to keep working on the project.
- It may make sense to put the team on pause for a couple months, realizing that it is not good for the team if the project drifts indefinitely

4. Quick feedback from project leaders on tools and processes for project teams
   A. Timing of the meeting
      - The timing is good, since we are now engaged in the project
      - Like the hands-on nature of this meeting; very stimulating conversation
      - Consensus is that 2 meetings for the project leaders are good. The kickoff for the project leaders is a good grounding. This meeting at the midpoint is good to share best practices.
      - Another suggestion is for the new project leaders go through an orientation and then have this hands-on session at the project midpoint
   B. Tools: Creative Perspectives card deck
      - Cards were a plus, but not a resounding hit
      - Useful: 3
• Not particularly useful: 1

C. Tools: Google Docs
• Useful, 3
  o it is easy to iterate slide decks
  o we can also share folders with a client
• No Opinion, 1
  o Not sure, haven't used it yet
• Note: Evernote is a better collaborative tool

D. Tools: Checklist
• Useful, 3
• No Opinion, 1

E. Project Leader Central
• Useful, 1
• No opinion, 3