Setting and Managing Project Expectations

NONPROFITS & ASSOCIATIONS

Nonprofit sustainability is about telling stories, raising funds, and planning for the future. Our sweet spots are strategic planning, board development, fundraising, and marketing.

BUSINESS: BIG & SMALL

Change management, strategic planning and employee engagement, plus small business start-up strategy. With a focus on creative facilitation and actionable steps, we can scale to help you change.

GOVT, FAITH GROUPS, HIGHER ED

We are comfortable working in large systems with built in stakeholders and structures. Strategic planning, retreats, staff engagement and culture change all designed just for you.

Speed Networking Round #1

- Name
- Organization
- One question you hope gets answered in this session?

Speed Networking Round #2

- Name
- Organization
- Your greatest challenge in managing expectations.

Speed Networking Round #3

- Name
- Organization
- Which most describes the way you think:
  - "If everyone would just follow my plan we'd be okay."
  - "I just wish people would be more clear about what the want."

Pick a project or a relationship that is struggling because of an issue with expectations. Jot down a couple of bullets about the challenge.

Expectation is the root of all heartache.

Shakespeare

Expectation

A ●——————————————▶ B

Reality

A ●⟿⟿⟿⟿⟿⟿⟿▶ B

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Clarity

CLARITY IS KINDNESS

All drama is a result of misaligned commitments or unclear and/or unkept agreements

Gaye Hendricks

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Commitments

- Here we mean directional commitments of a project or an organization.
- This would be things like mission, vision, and values.
- Scopes or proposals lay out commitments.

Agreements

- An agreement is very simply:
  - WHO
  - Is doing WHAT
 - by WHEN

Stakeholder Map

Who are your key stakeholders and what are the expectations and relationships you have with them?

Center Circle = Stakeholders

Second Circle = What your stakeholders expect from you

Outer Circle = What you expect from your stakeholders

Given expectations, what is the core message for each stakeholder?

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we make change possible
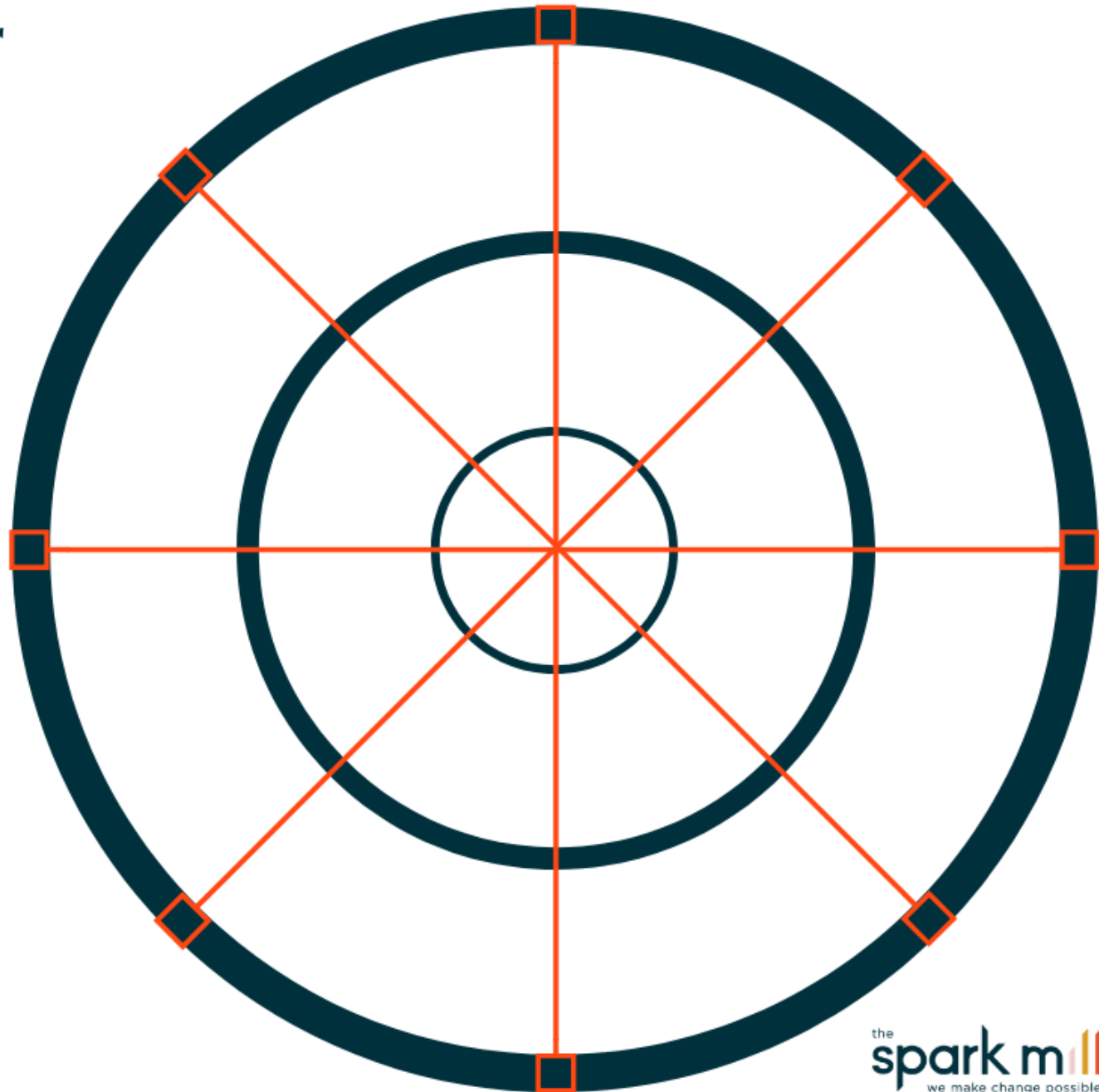
Fact and Story

Fact and Story

- Facts are things that we could record with a video camera and were to go back and watch the film we could see it

- Stories are our interpretation of the facts or the narratives in our minds that we tell about the facts we see

Candor – Revealing & Not Concealing

REVEALING

- Requires some risk to share your thoughts
- Invites connection
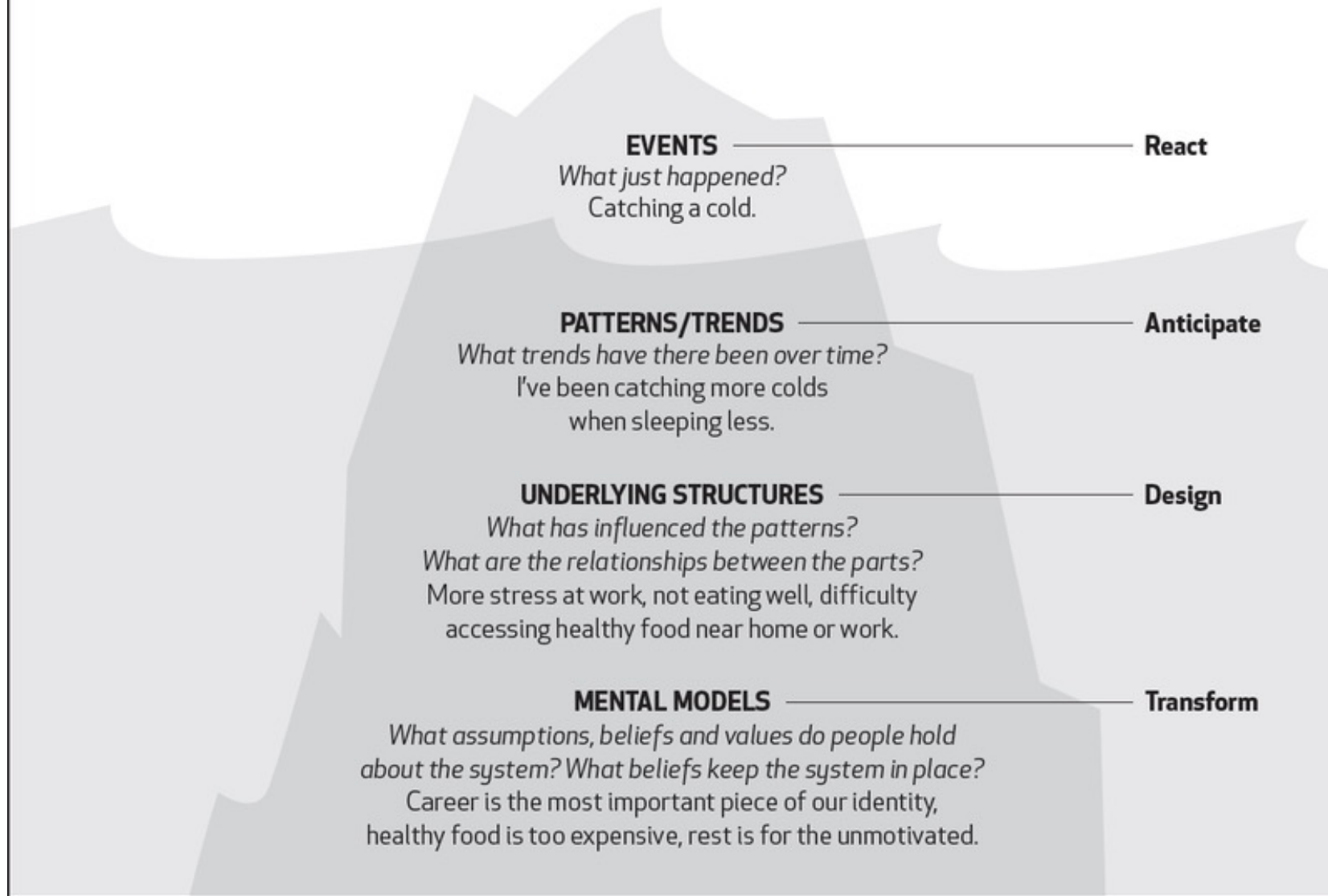- Strengthens alignment
- Builds trust

CONCEALING

- Withdraws
- Projects what the other party is thinking
- Increases distance

Again, think about the project you chose at the beginning of the session. Where is there a conflict of stories? Have you shared your thoughts? Have you tested the accuracy of your stories by revealing them?

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Active Listening

THE ICEBERG
A Tool for Guiding Systemic Thinking

EVENTS ———————————————— React
What just happened?
Catching a cold.

PATTERNS/TRENDS ———————————— Anticipate
What trends have there been over time?
I've been catching more colds
when sleeping less.

UNDERLYING STRUCTURES ———————— Design
What has influenced the patterns?
What are the relationships between the parts?
More stress at work, not eating well, difficulty
accessing healthy food near home or work.

MENTAL MODELS ———————————— Transform
What assumptions, beliefs and values do people hold
about the system? What beliefs keep the system in place?
Career is the most important piece of our identity,
healthy food is too expensive, rest is for the unmotivated.

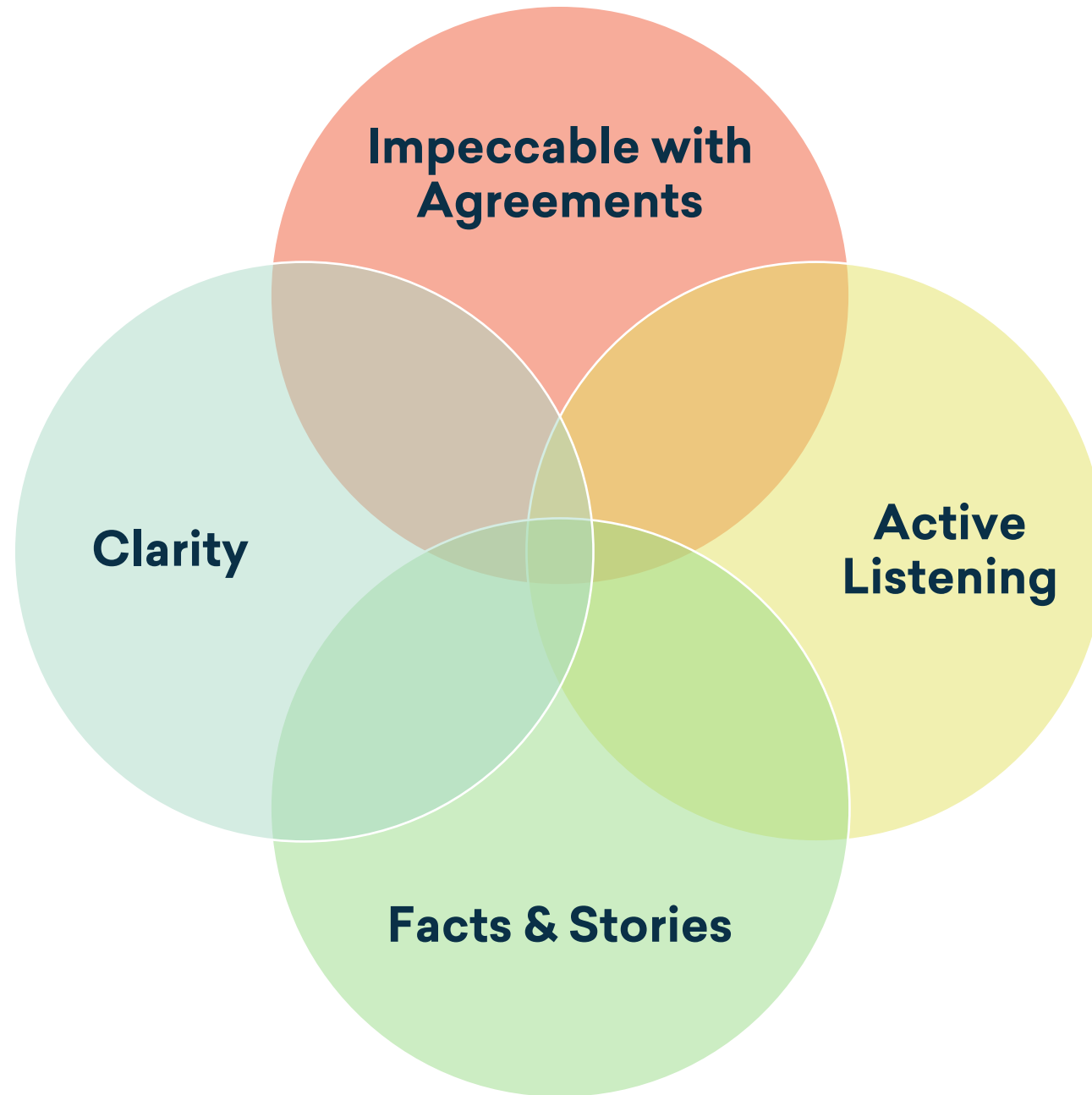https://www.nwei.org/iceberg/

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Types of Listening

- Listening to fix or solve
- Listening to be "right" or respond
- Listening to understand

Four Principles for Managing Expectations

- CLARITY. Do the thrashing up front to get clarity on commitments and agreements

- Separate FACTS from STORIES
  - Test your stories/assumptions by revealing (CANDOR)

- LISTEN to understand not to respond or tell the other person how wrong they are

- Be impeccable with your AGREEMENTS

QUESTIONS?

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