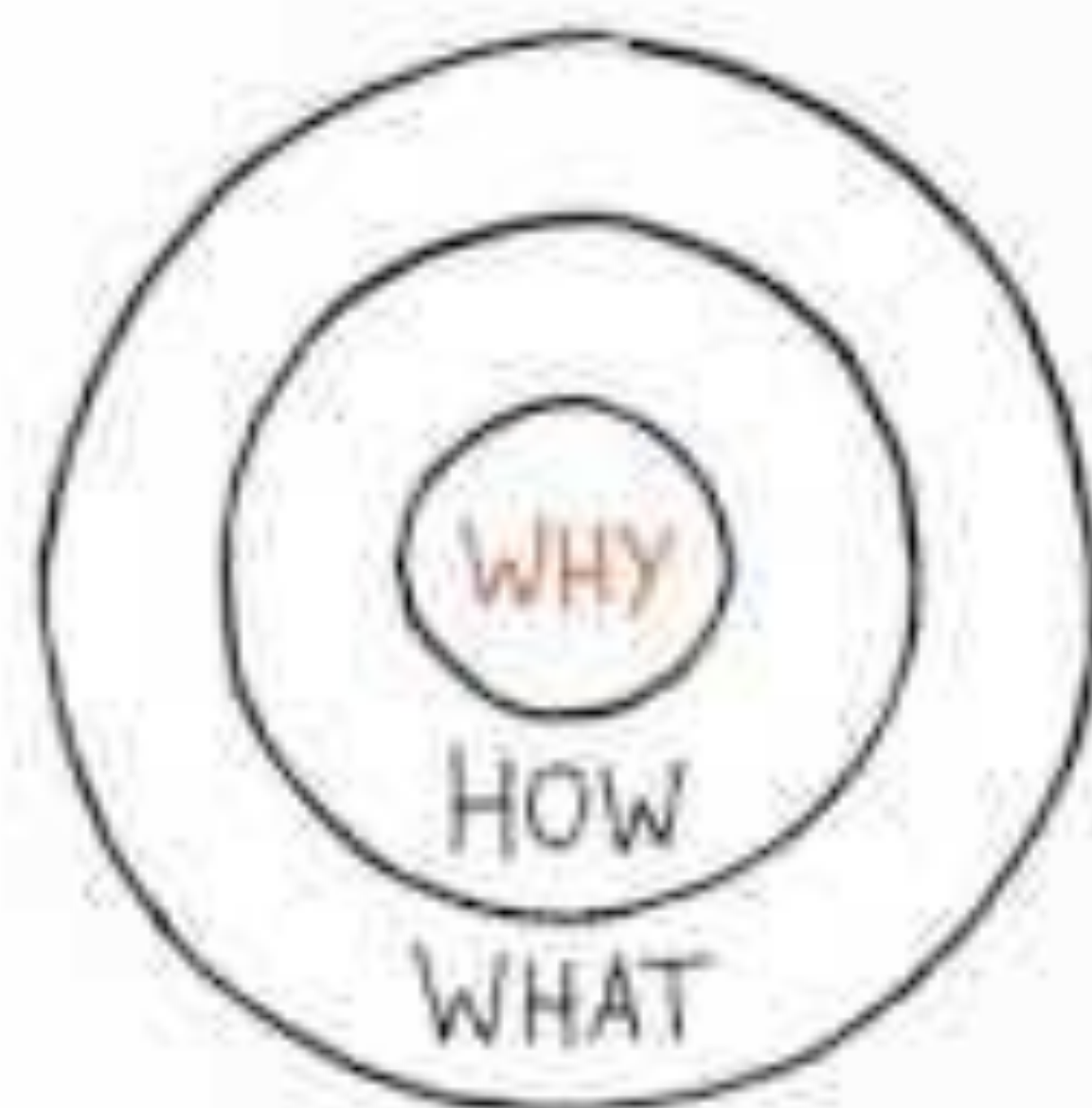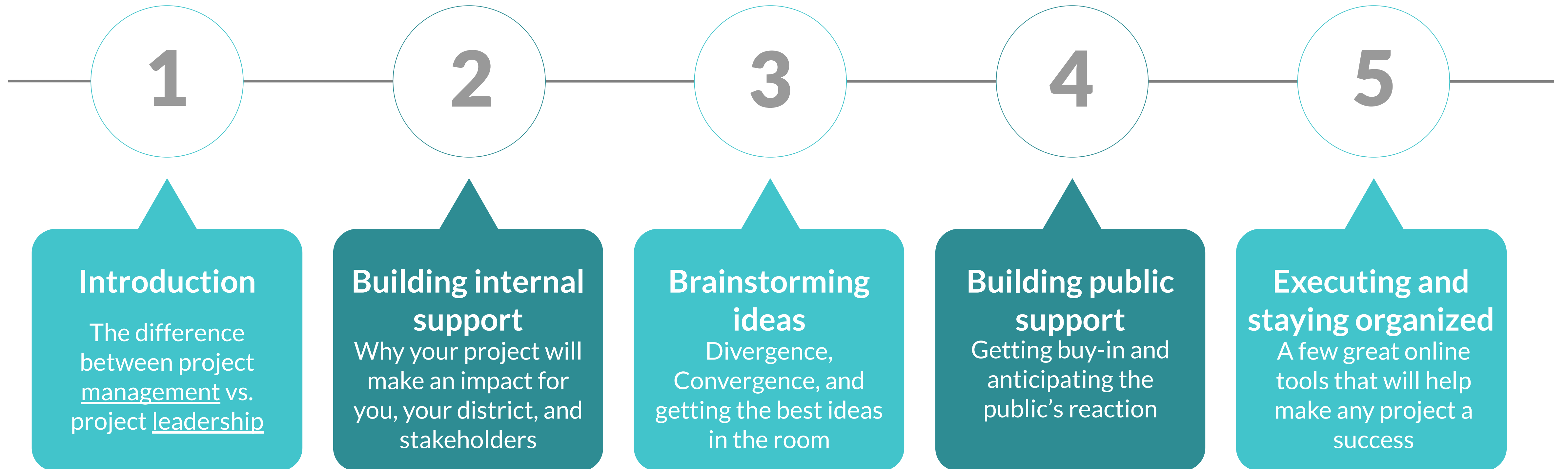# Why Me? Why Us?

Sloane Dell'Orto

Background in journalism, marketing, and fire fighting / EMS (via special districts). But really, my "why" for this talk is more specific than that....

What we'll cover today

1　　**2**　　**3**　　**4**　　**5**

Introduction
The difference between project management vs. project leadership

Building internal support
Why your project will make an impact for you, your district, and stakeholders

Brainstorming ideas
Divergence, Convergence, and getting the best ideas in the room

Building public support
Getting buy-in and anticipating the public's reaction

Executing and staying organized
A few great online tools that will help make any project a success

Plus a recap at the end, of course, just in case you were sleeping! :)

1

Project Leadership is different than Project Management

Project Management

"Project Management gets things done"

Project Leadership

"Project Leadership makes change happen"

Project Management

Creates a project plan and directs actions

Focuses on processes, systems and procedures

Communicates the project plan

Does things 'right'

People do what a Project Manager asks, because it is their job

Project Leadership

Creates a vision and strategy, inspire people to act

Focuses on people, their commitment and their ideas

Paints a vision of the future

Does the right things

People do what a Project Leader asks, because they want to

Project Management

The Yellow Bus analogy:

People must ride the yellow bus if they want to travel where they need to go.

The driver is skilled and, if the bus breaks down on the way, the driver figures out what to do.

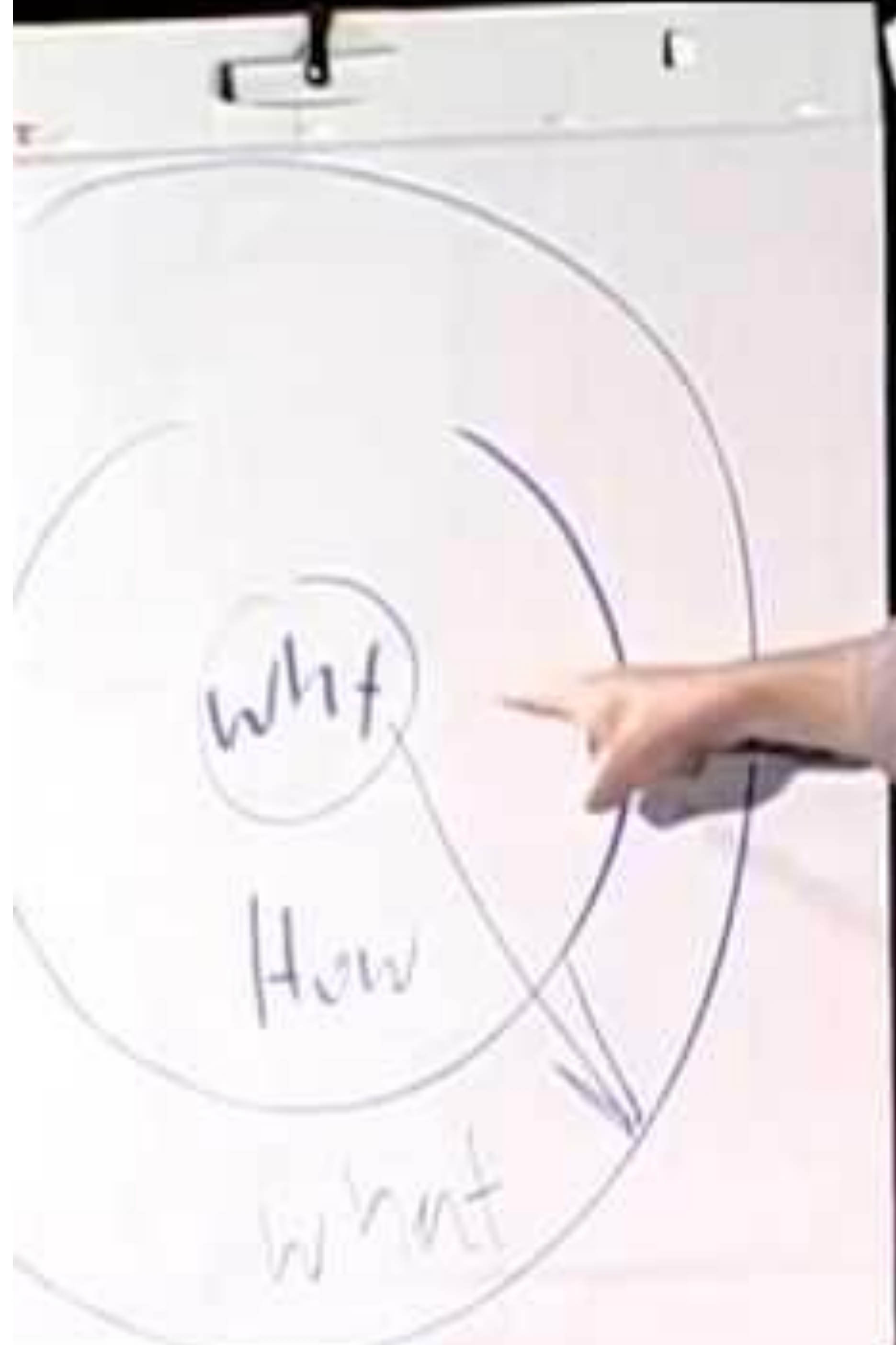# Project Leadership

The Purple Bus analogy:

People hear the driver of the purple bus talking about the destination, and they hop on because they want to join the trip!

The driver is skilled and, if the bus breaks down, they all get out and want to help figure out what to do.

2

Building internal support:
Finding your "why"

Get the exercise documents!
getstreamline.com/lead

(Look for links on the right: **Your Noble Purpose** and **Your Project Why and User Stories**)

Exploring your "why"

Exploring your organization's noble cause

Finding the two core "whys"

Creating user stories to understand others

In your own words - no copying and pasting! - spend 90 seconds writing down your organization's mission statement, or noble cause. You can use paper, the fillable PDF provided, or the Zoom chat feature.

Why do you exist? Who are you for the world?

Exercise 1a:
Noble Cause

Often referred to as a mission statement, or

the 30-second elevator pitch

Spend 60 seconds writing down your personal reason for serving your organization. Why did you join your organization? How do you contribute to the larger "why"?

Use paper, the fillable PDF provided, or the Zoom chat feature.

**Exercise 1b:
Your personal why**

Why do you do what you do?

Spend 60 seconds writing down why the project you have in mind matters. If you don't have a big project in mind, choose something simple that would improve your community.

You can use paper, the fillable PDF, or the Zoom chat feature.

**Exercise 2a:
Your project "why"**

Why does this project matter?

How will it change the world?

Let's write two user stories related to your project.

Format:

As a ... (type of person who will be affected by your project)

I want ... (the thing they wish for, that your project might provide)

So that ... (the reason for that wish)

Exercise 2b:
User stories

We only truly understand others when

we are able to see through their eyes.

Examples:

As a local school child **I want** a safe neighborhood park **so that** I can play with friends after school

As a field supervisor **I want** better communication equipment **so that** I don't have to have my team travel back to the office to check in multiple times each day

As a board member **I want** a tablet provided by the district **so that** I don't have to use my personal device to access district documents to fulfill the duties of my office

Exercise 2b:
User stories

We only truly understand others

when we are able to see through their eyes.

Before going into a brainstorming or planning session, share the results of these exercises with your team. Everyone should go around the table and read their responses, one exercise at a time.

**Last step:
Share with your team**

3

**Brainstorming ideas:
Divergence, Convergence, and getting
the best ideas in the room**

The Creative Process consists of cycles of divergent and convergent thinking.

- Divergence—teams go wide to find insights and generate new ideas.
- Convergence—teams narrow their focus by refining ideas and synthesizing information.
- Multiple cycles of iteration—with each phase, you move closer to a refined solution.
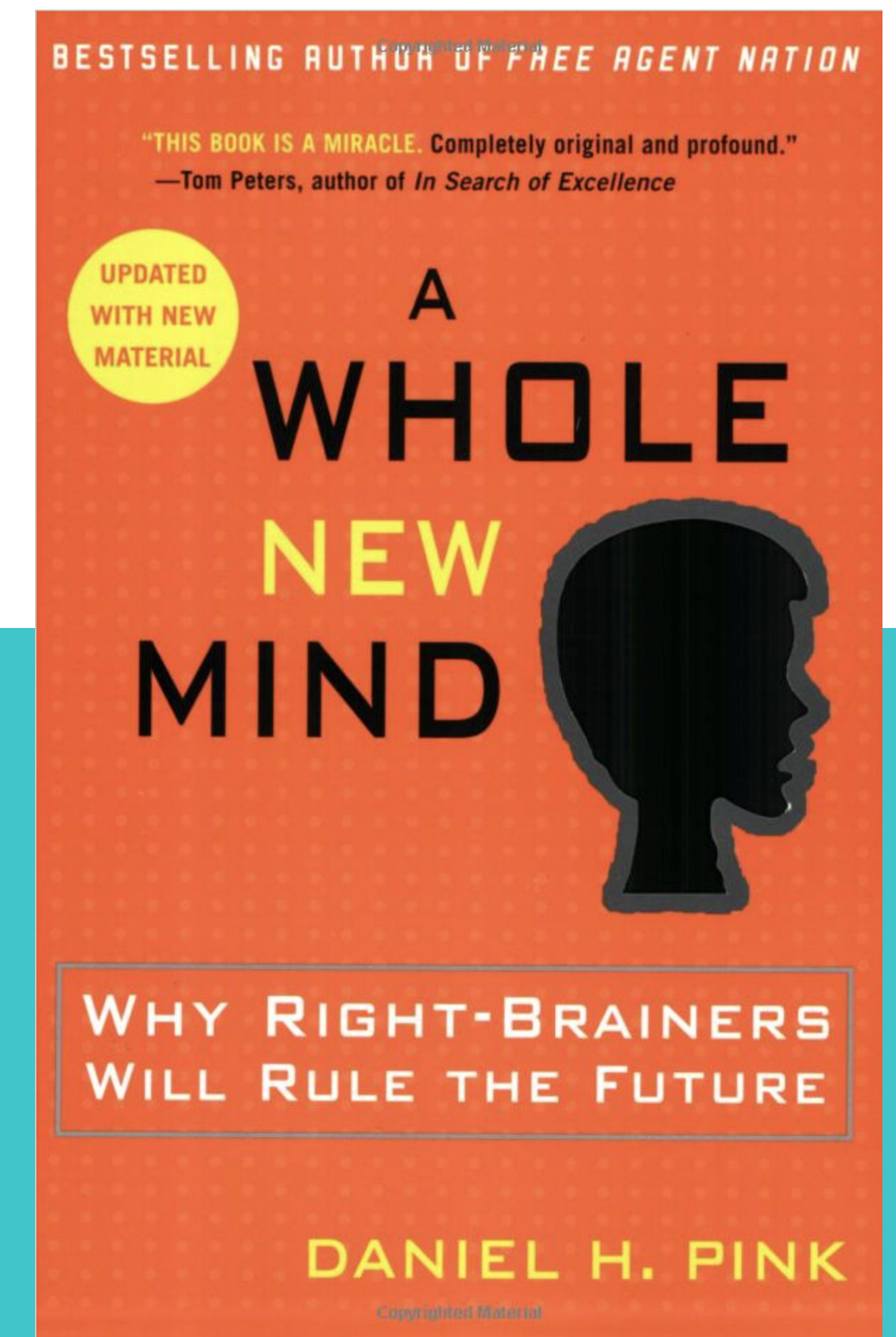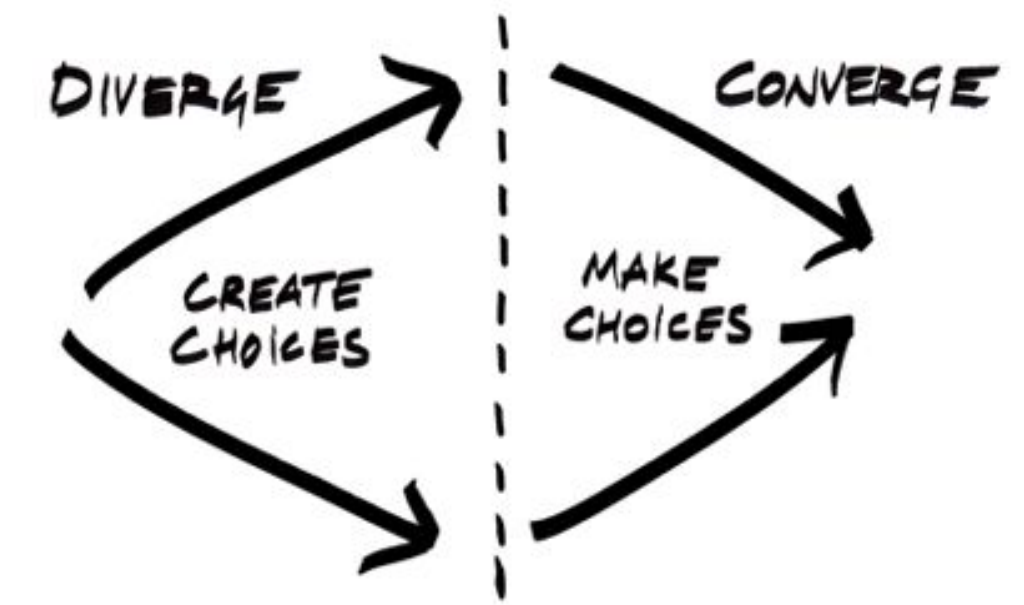
Divergent > Convergent cycles

Get ready for a (short) physical exercise!

Brainstorming is effective to:

- Produce a large number of ideas
- Generate ideas quickly
- Expand your portfolio of alternatives
- Get people unstuck
- Inject insights from a broader group
- Build enthusiasm
- Solve tricky problems
- Improve team collaboration

Why brainstorm?

Get a copy of this PDF at   ideou.com/pages/brainstorming

IDEO U

Rules of Brainstorming

Defer Judgment
Creative spaces are judgment-free zones—they let ideas flow so people can build from each other's great ideas.

Encourage Wild Ideas
Embrace the most out-of-the-box notions. There's often not a whole lot of difference between outrageous and brilliant.

Build on the Ideas of Others
Try to use "and" instead of "but," it encourages positivity and inclusivity and leads to tons of ideas.

Stay Focused on the Topic
Try to keep the discussion on target. Divergence is good, but you still need to keep your eyes on the prize.

One Conversation at a Time
This can be difficult—especially with lots of creative people in a single room—but always think about the challenge topic and how to stay on track.

Be Visual
Use colored markers and Post-its. Stick your ideas on the wall so others can visualize them.

Go for Quantity
Crank your ideas out quickly. For any 60-minute session, you should try to generate 100 ideas.

Brainstorming Don'ts

Don't judge.

Creative spaces don't judge. They let the ideas flow, so that people can build on each other and foster great ideas.

You never know where a good idea is going to come from, the key is make everyone feel like they can say what's on their mind and others can build on it.

Brainstorming Dos

Encourage wild ideas.

Wild ideas can often give rise to creative leaps. In thinking about ideas that are wacky or out there we tend to think about what we really want without the constraints of technology or materials.

Aim for as many new ideas as possible. In a good session, up to 100 ideas are generated in 60 minutes. Crank the ideas out quickly.

Brainstorming Don'ts

Don't be a "but"

Creativity flows much more naturally when you let your right brain take over and keep the left brain (that tends to focus on constraints) a bit quiet.

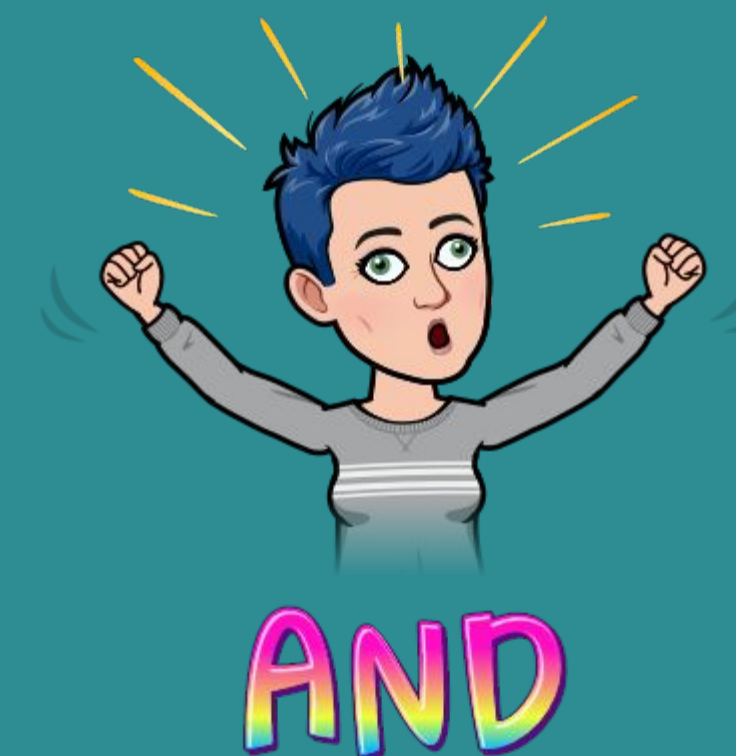To build on ideas, don't follow someone's thought with, "But if we…"

Brainstorming Dos

Instead, be an "and"

When someone tosses out an idea - especially a crazy one, build on it by following with, "Yes, and if …" to add to the momentum.

Keep in mind you aren't trying to vet ideas at this stage.

Brainstorming Don'ts

Don't interrupt

When a lot of ideas are popping out, it's easy to get enthusiastic and step on someone's comments before they're finished.

Listening is as important as speaking in your brainstorm sessions.

Brainstorming Dos

Stay focused

When it starts to get creative, it's easy to go far afield and start brainstorming unrelated topics.

Make sure someone on your team is responsible for keeping everyone on track.

The step where you combine similar ideas, narrow down the field to ideas that you can actually use.

That doesn't mean you throw out difficult-to-accomplish ideas, though. They may just require another dedicated brainstorm to fully vet them before deciding.

**Converging:
narrowing your options**

Miro

Brainstorming tools

Lucidspark
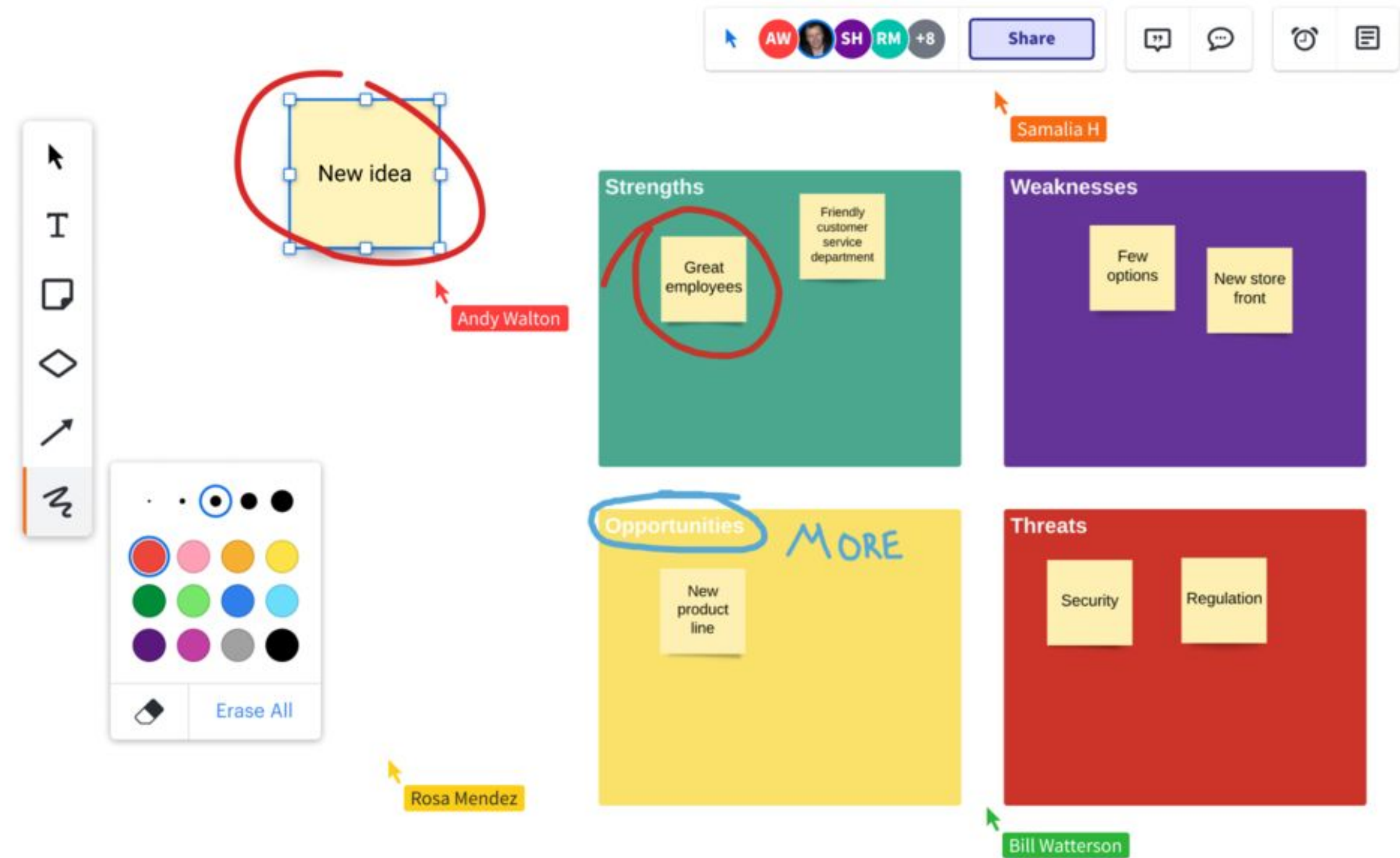
Brainstorming tools

DIVERGE
create choices

CONVERGE
make choices
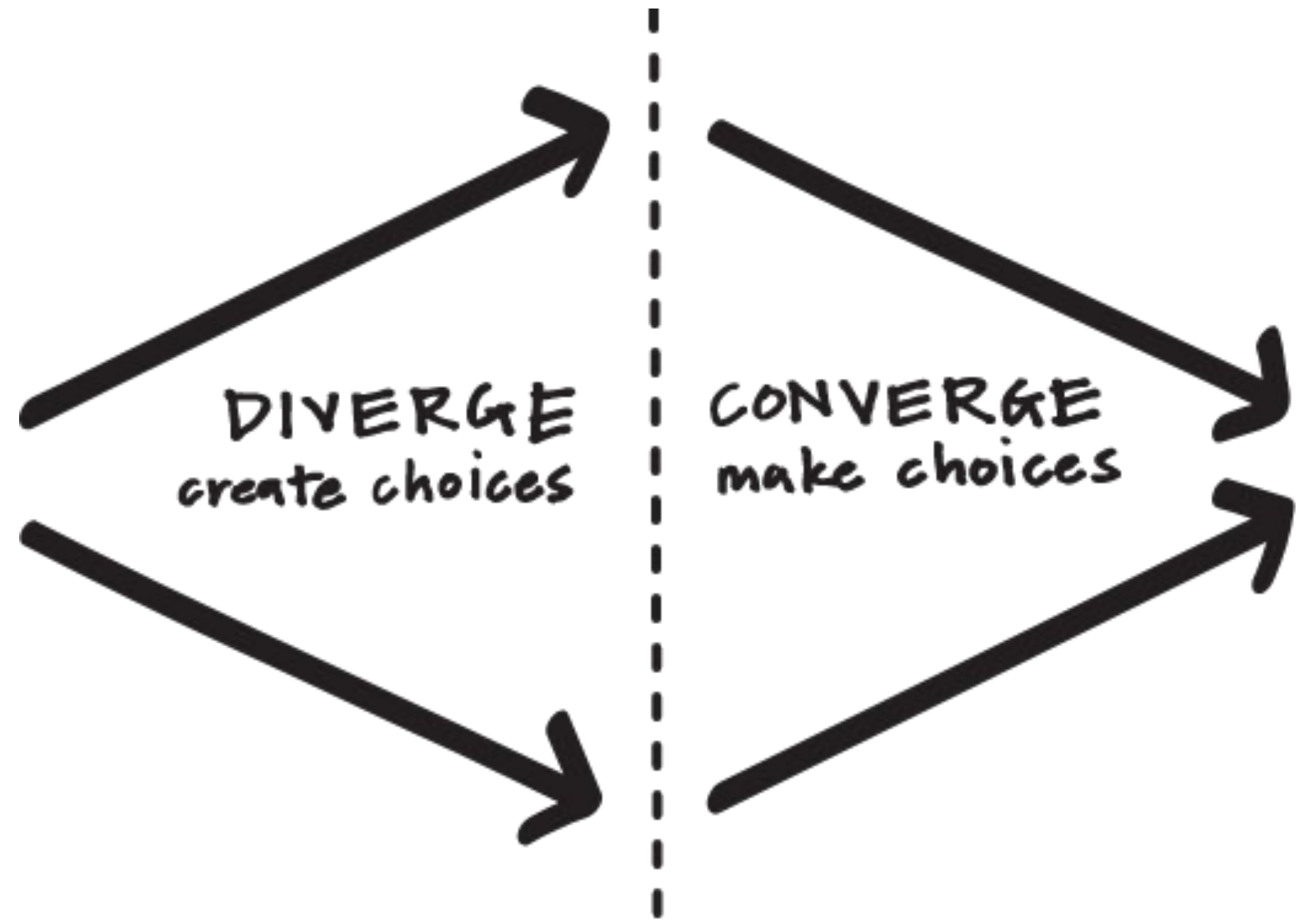
Divergent and convergent thinking

IDEO

DIVERGE
create choices

CONVERGE
make choices
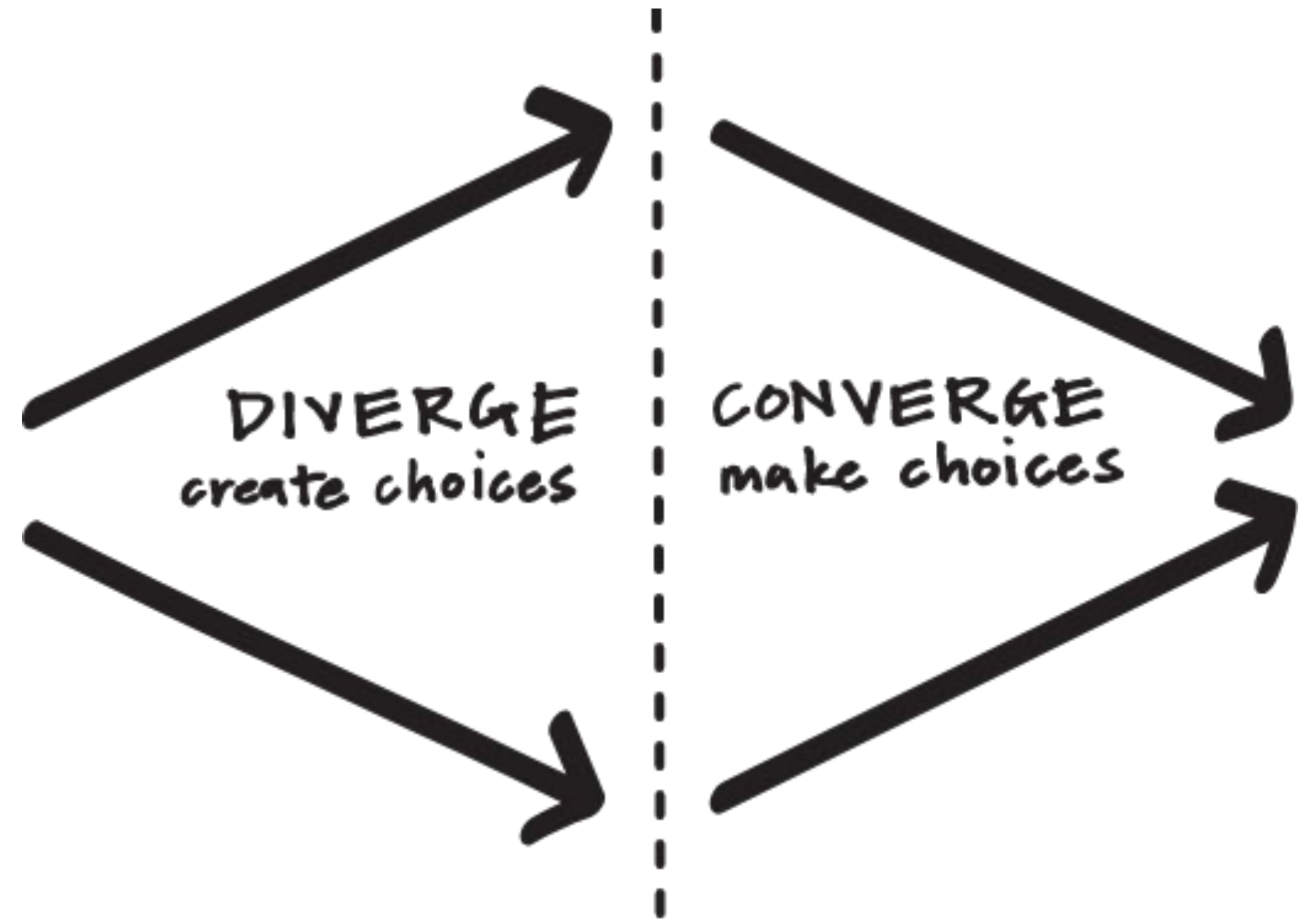
Divergent and convergent thinking

IDEO

4

**Building public support:
Getting buy-in and anticipating the public's reaction**

Getting Buy-in

1 Do the research

2 Anticipate resistance

3 Wait until you're ready

**4** Prepare a compelling presentation

1.
Do the research

Do you understand the scope of the project, and what it will take in both staff and financial resources?

Do you understand the big picture financial implications to your district?

Have you considered how the project might look to the public or media, and how you might garner support?

Research methods:

- Surveys (via mail, via email, on your website)
- Professional polling companies
- Services like FlashVote
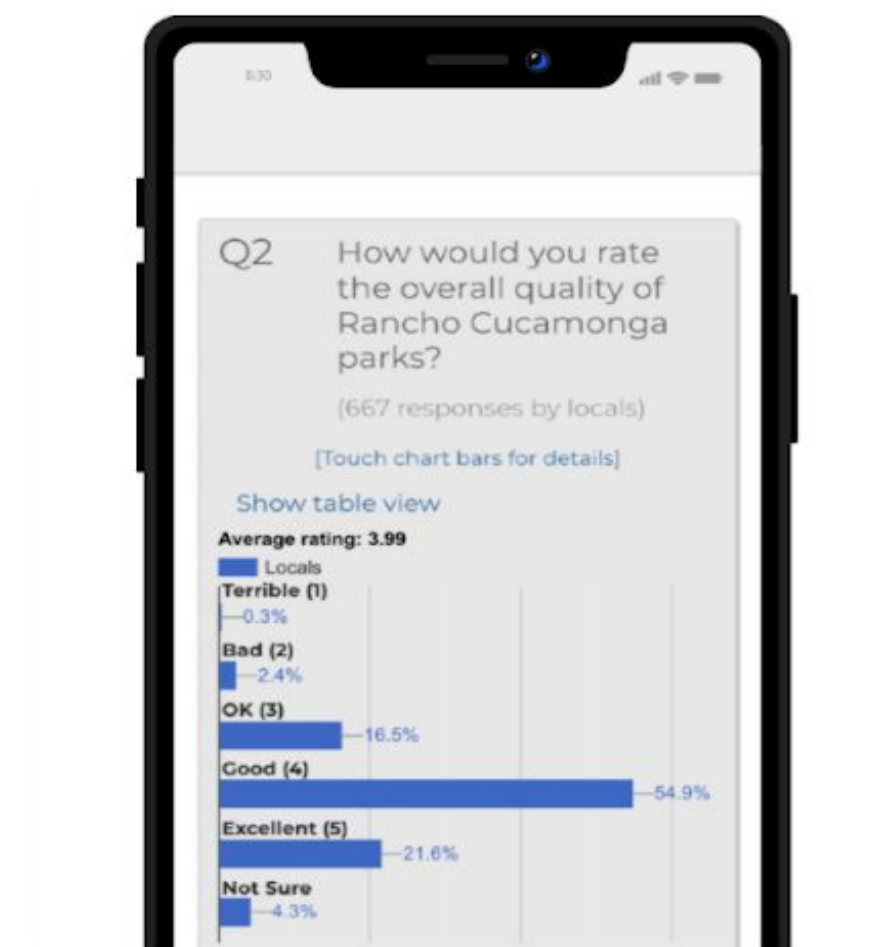
Do the research

A city wanted to see if people actually hated their parks

"Nothing but complaints" came in after they cut back the frequency of maintenance. Department morale plummeted. We showed them the whole community still "loves, loves, loves the parks" – scoring a 4.0 out of 5 – and staff morale improved overnight. **See a full case study and survey link »**

A special district wanted to survey employees anonymously but affordably

They wanted candid employee input on satisfaction and other topics, but faced the challenge that in-house surveys aren't truly anonymous. We saved them from paying consultants and got them great results, with 85% participation in 48 hours.

Do the research

2.
Anticipate resistance

If people are going to question whether it's a good idea to do what you're proposing, what will their reasons be?

Consider all of your audiences: staff, board, the public, even the media.

Do a brainstorm session focused specifically on this and be ready to address the concerns you come up with.

Anticipate resistance

- Brainstorming can help
- Or try a premortem!

Pre-mortem

From Wikipedia, the free encyclopedia

A **pre-mortem**, or **premortem**, is a managerial strategy in which a project team imagines that a project or organization has failed, and then works backward to determine what potentially could lead to the failure of the project or organization.[1][2]

The technique breaks possible groupthinking by facilitating a positive discussion on threats, increasing the likelihood the main threats are identified. Management can then reduce the chances of failure due to heuristics and biases such as overconfidence and planning fallacy by analyzing the magnitude and likelihood of each threat, and take preventive actions to protect the project or organization from suffering an untimely "death".

3.
Wait until you're ready

If this project matters to you, it's worth waiting to talk about it until you're ready to do so.

Don't just casually mention it in passing before you've done steps 1 and 2.

Once you're ready, prepare a compelling presentation for your GM, board presentation, or public hearing.

4.
Build a compelling presentation

People absorb information in different ways, so provide something that speaks to everyone (visual presentation, printed backup materials, audible storytelling).

Use the printed backup for details. Keep slides minimal, and as visually interesting as possible.

5

Executing and staying organized

Trello

Free	Business Class	Enterprise
$0	$9.99	$17.50
per user per month	per user per month	per user per month
forever	monthly annually	for 100 users
Get Started	Learn More	Learn More

STANDARD FEATURES

10 Boards per Team	Unlimited Boards per Team	Unlimited Boards per Team
Unlimited Cards	Unlimited Cards	Unlimited Cards
Unlimited Lists	Unlimited Lists	Unlimited Lists
10MB per File Attachment	250MB per File Attachment	250MB per File Attachment
-	Advanced Checklists	Advanced Checklists
	Priority Support	Priority Support
	Observers	Observers
	Custom Backgrounds & Stickers	Custom Backgrounds & Stickers

Work with any team

Whether it's for work, a side project or even the next family vacation, Trello helps your team stay organized.

Start doing →

Team Tasks

Doing
Client meeting
Plan webinar
Email newsletter
Add a card...

Done
Publish podcast
Launch website
Add a card...
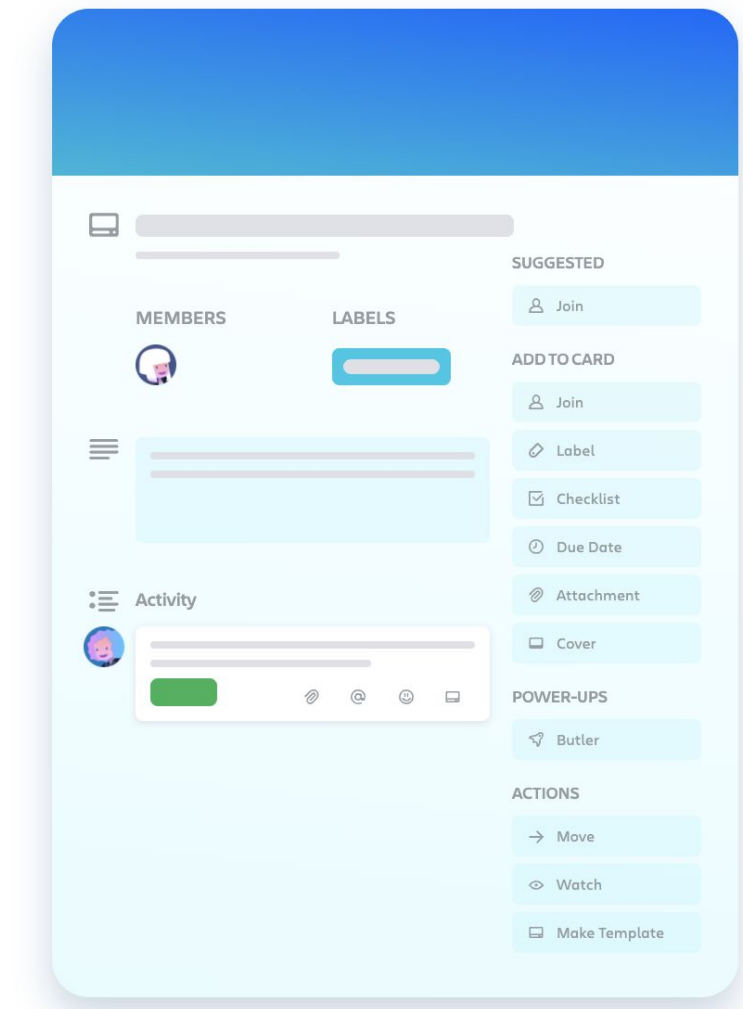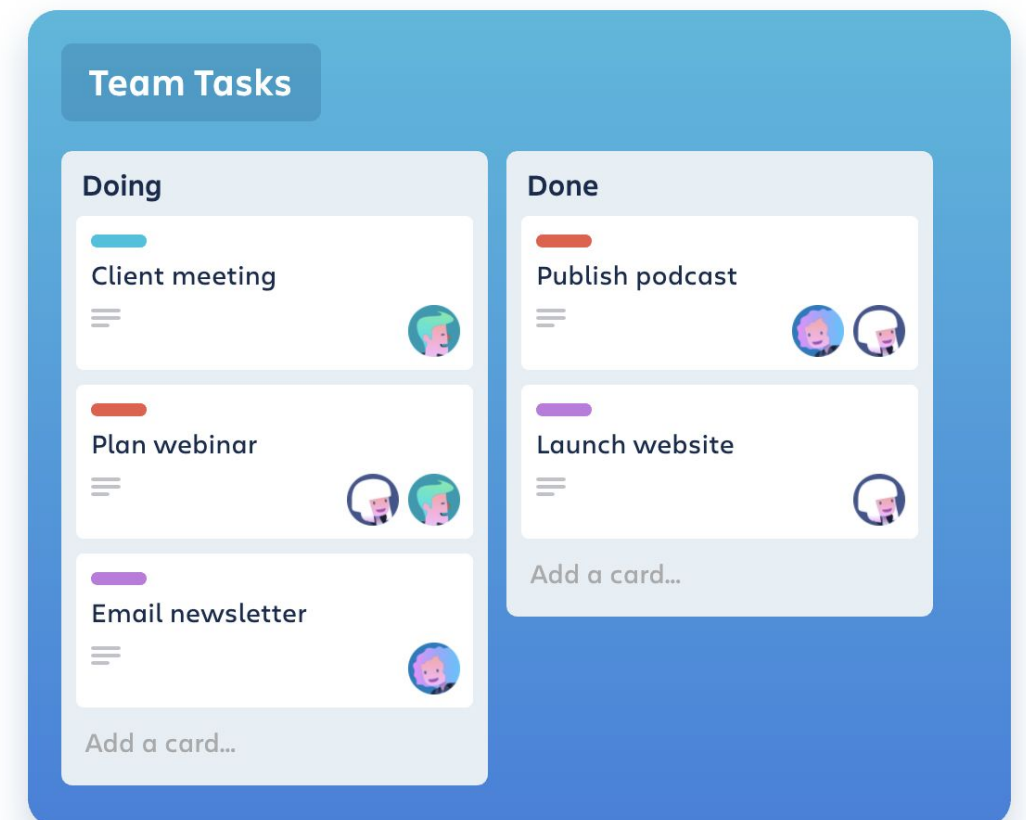
Information at a glance

Dive into the details by adding comments, attachments, due dates, and more directly to Trello cards. Collaborate on projects from beginning to end.

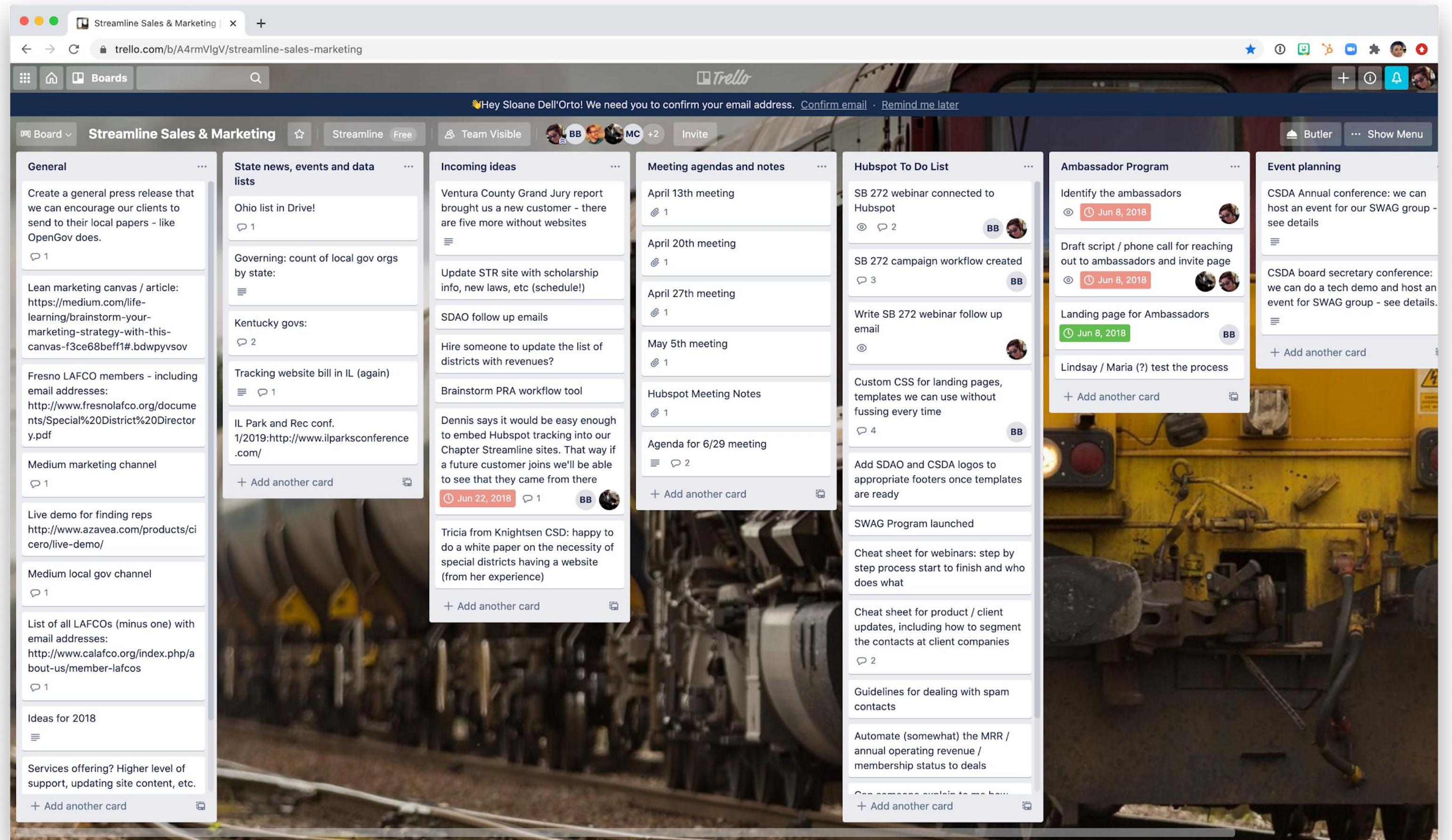# Project Management tools

Trello

Likes:

Free option (not just trial)

Super simple to use

If you don't have multiple "stacks" or projects, super easy to track

Dislikes:

Can feel overwhelming if you have a lot of "stacks"
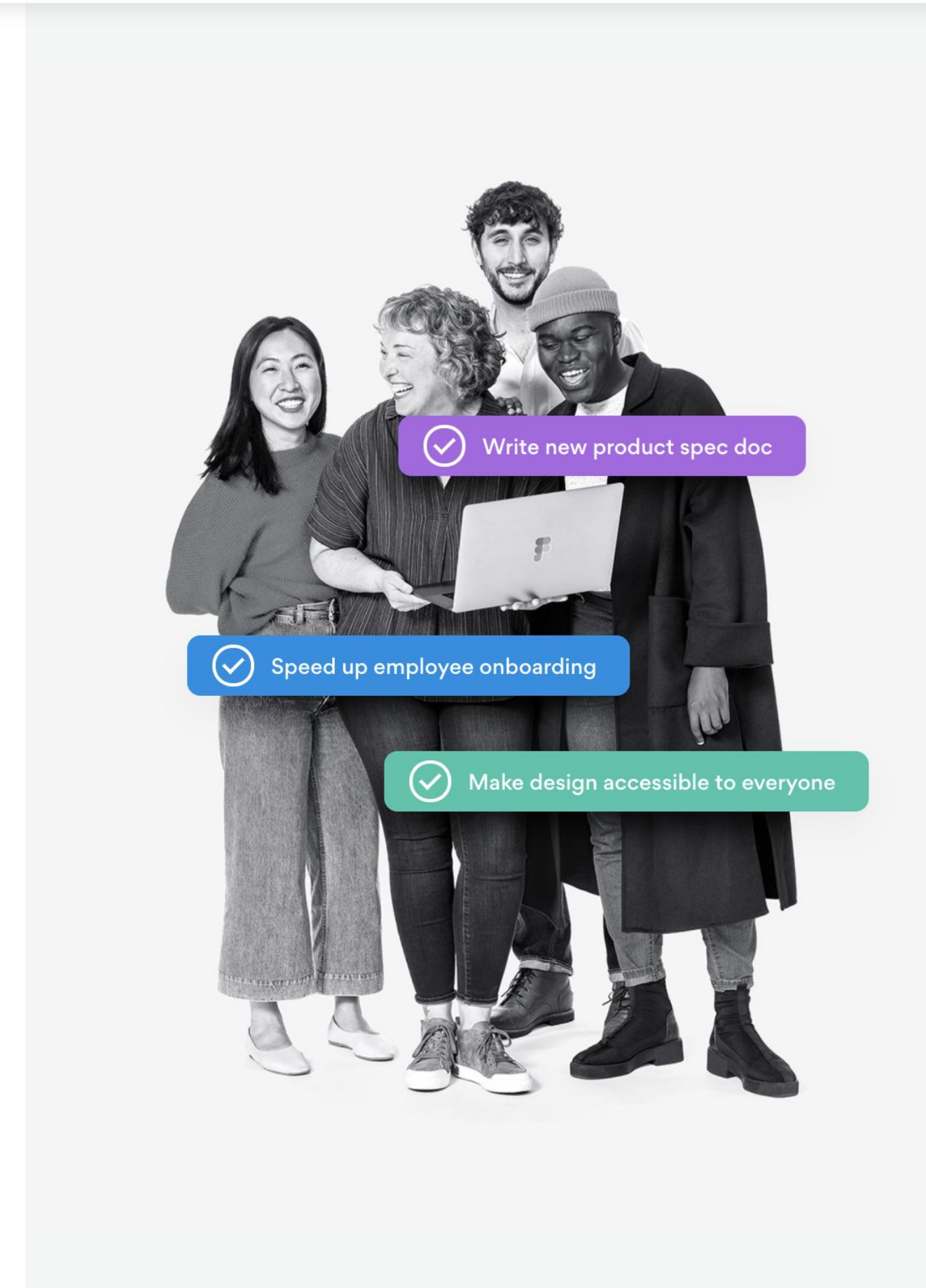

Project Management tools

Asana

Basic	Premium	Business	Enterprise
For individuals or teams just getting started with project management.	For teams that need to create project plans with confidence.	For teams and companies that need to manage work across initiatives.	For organizations that need additional security, control, and support.
$ 0	$ 10.99	$ 24.99	Let's talk
Free forever	Per user, per month billed annually $ 13.49 billed monthly	Per user, per month billed annually $ 30.49 billed monthly	
Get Started	Try for free or purchase now	Try for free or purchase now	Contact Sales

Manage tasks and personal to-dos:	Track team projects with features and resources like:	Everything in Premium, plus:	Everything in Business, plus:
✓ Unlimited tasks	✓ Timeline	✓ Portfolios	✓ SAML
✓ Unlimited projects	✓ Dashboards NEW	✓ Goals	✓ User provisioning & deprovisioning (SCIM)
✓ Unlimited activity log	✓ Advanced search & reporting	✓ Workload	✓ Data export & deletion
✓ Unlimited file storage (100MB per file)	✓ Custom fields	✓ Custom rules builder	✓ Block native integrations
✓ Collaborate with up to 15 teammates	✓ Unlimited free guests	✓ Forms branching & customization	✓ Custom branding
✓ List view projects	✓ Forms	✓ Approvals	✓ Priority support
		✓ Proofing	

asana

Work on big ideas, without the busywork.

From the small stuff to the big picture, Asana organizes work so teams are clear what to do, why it matters, and how to get it done.

Try for free

✓ Write new product spec doc

✓ Speed up employee onboarding

✓ Make design accessible to everyone

Figma manages their work with Asana.

Project Management tools
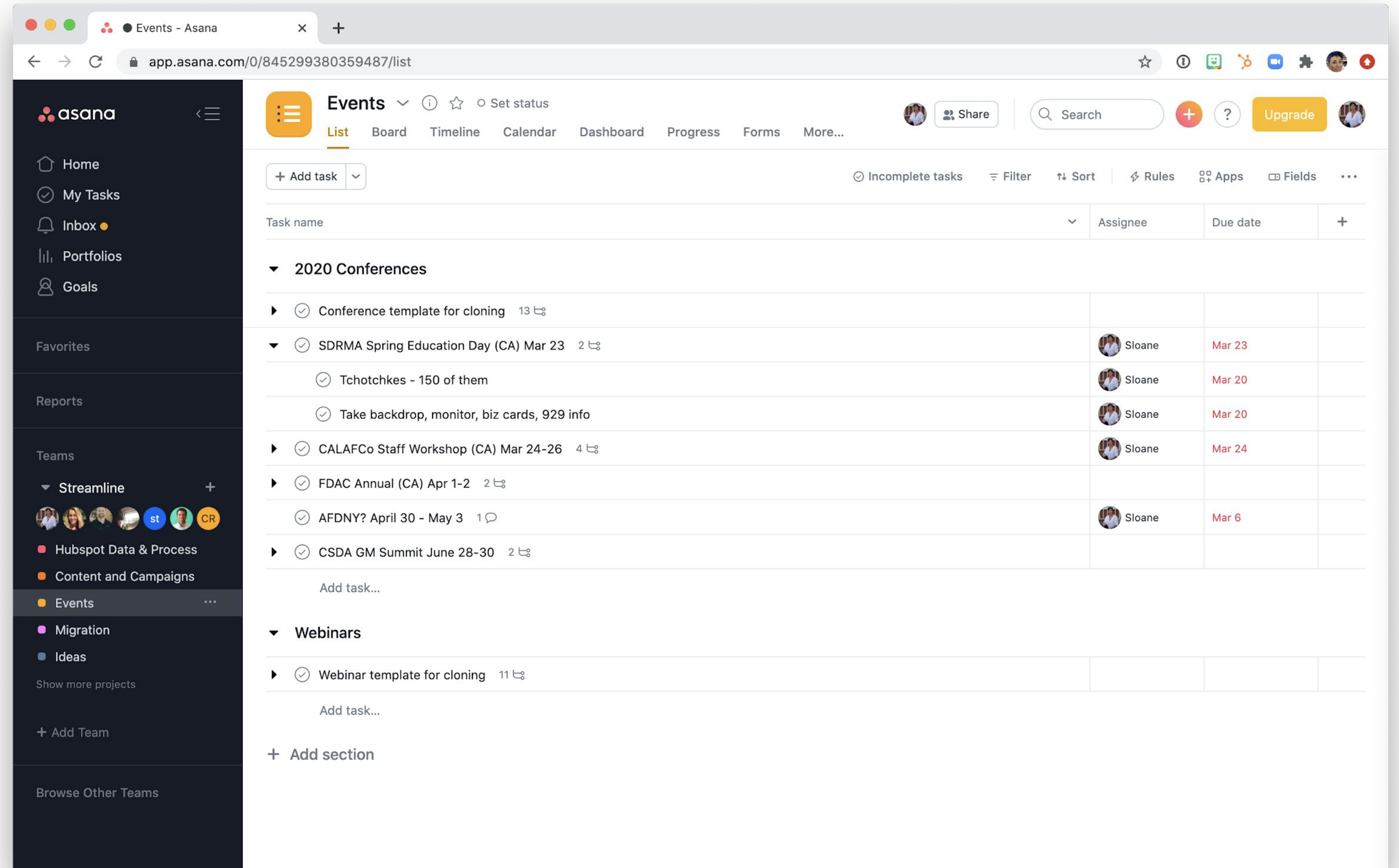
Asana

Likes:

Free option (not just trial)
Super simple to use
Organization makes sense for my brain :)
(Projects, tasks, calendar view, etc)

Dislikes:

Honestly, I just dislike that I am so
disorganized that even a straightforward
tool like this doesn't stay updated

Project Management tools

Basecamp

How it works   Before & after   Got clients?   Pricing   Support   Sign in   Try it FREE

Basecamp

Basecamp Business: $99/month flat

If you want to run your business on Basecamp, this is the plan for you. Includes **every feature** we offer plus **unlimited projects**, **unlimited users**, and **no per user fees**.

Start a free 30 day trial
no credit card required, cancel any time

Unlimited projects
Create as many projects as you need to keep things organized.

Unlimited users
Invite anyone and everyone. No per seat charges.

500GB storage space
Centralize everything with loads of storage space.

Company HQ
A dedicated space to run your entire company.

Team projects
Give every team their own space to collaborate.

Unlimited clients
Work with clients & contractors in Basecamp.

Advanced client access
Gain total control over what clients can see.

Project templates
Save time by rapidly spinning up similar projects.

Priority support
Jump to the front of the line when you need help.

Create a place in Basecamp for each project or team.

Involve everyone who's working on the project.

Use dedicated tools to discuss, plan work, give status updates, ask questions, share files, and more.

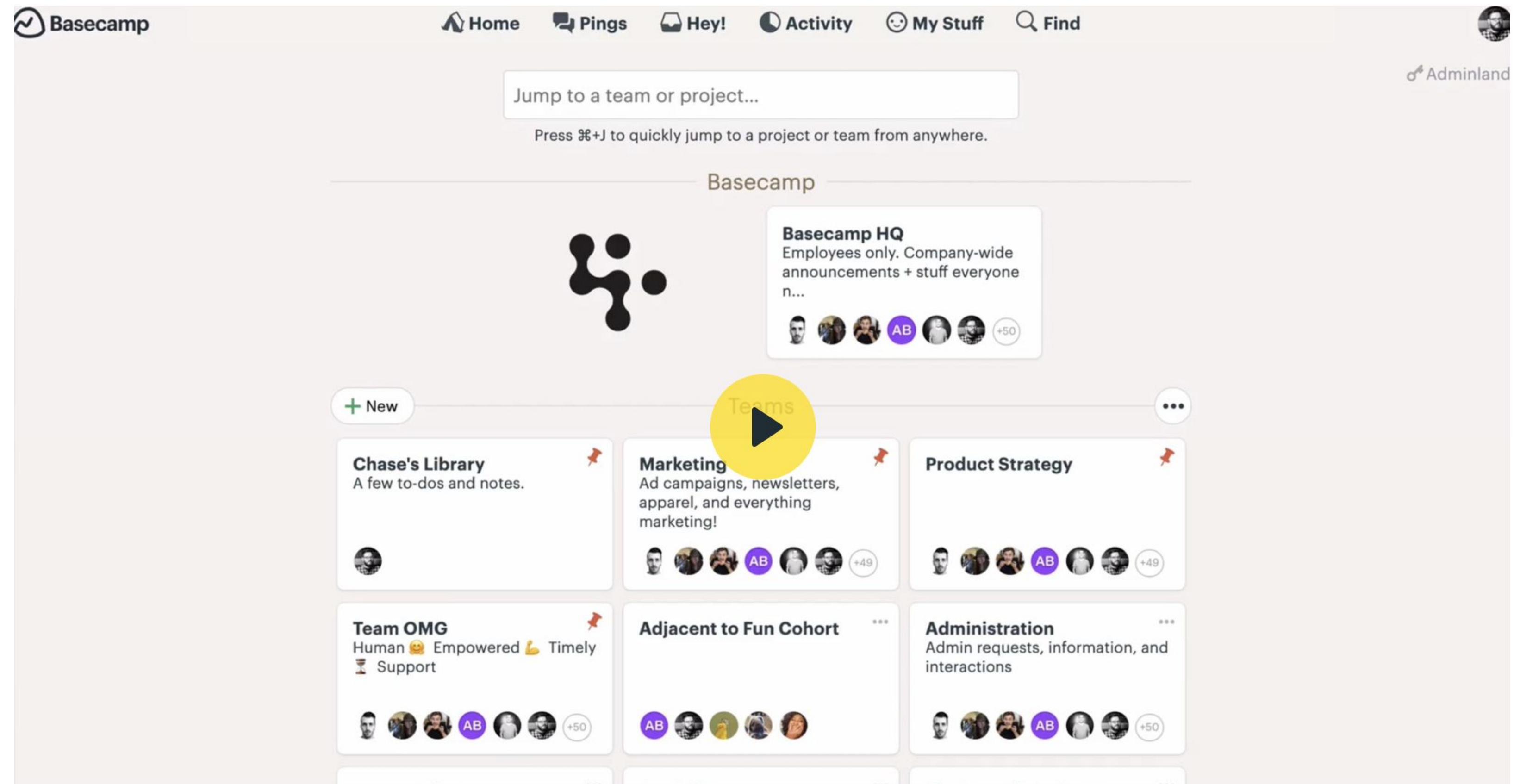See what happened when, no meetings required.

Project Management tools

Basecamp

Likes:
Free option (not just trial)
Flat fee vs. per user fee
Lots of collaboration tools (chat etc)
My first PM love <3

Dislikes:
Visually confusing / overwhelming
Hard to tell what's most important
(It didn't used to be this way!) :(((

Project Management tools

Teamwork

Free Forever
$0

- Max 5 users
- 2 Projects
- 100 MB Storage

Get started now

Pro
$10
/ user / month, billed annually
$12.50, billed monthly

- Min 5 users
- 300 Projects
- 100 GB Storage
- Integrations, Client Users, Templates & Much More

Try free for 30 days

No card required, cancel anytime

Premium
$18
/ user / month, billed annually
$22.50, billed monthly

- Min 5 users
- 600 projects
- 250 GB storage
- Advanced project management features

Try free for 30 days

No card required, cancel anytime

Enterprise
Contact Us

- Unlimited Projects
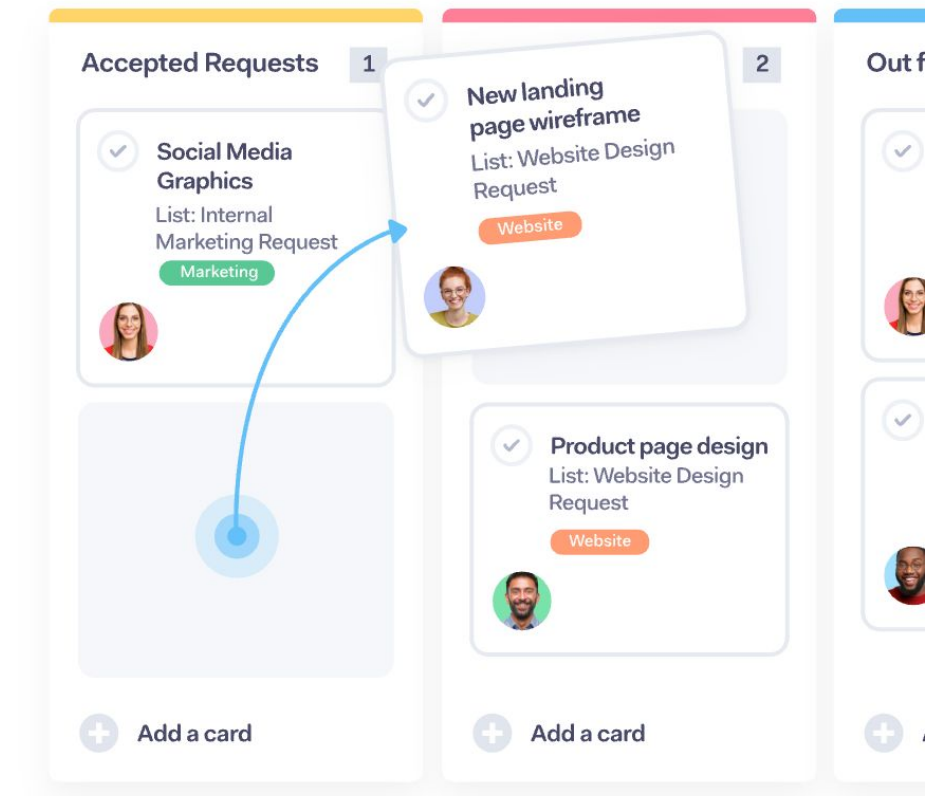- Enterprise security and support

Contact Sales

The project management software loved by Project Managers

Trusted by over 20,000 companies

- ✔ **Simple to use, powerful when you need it**
- ✔ **Manage multiple complex projects with ease**
- ✔ **Scales into a full platform**

Try Teamwork for free

30-day free trial
No credit card required

Project Management tools

Teamwork

Likes:
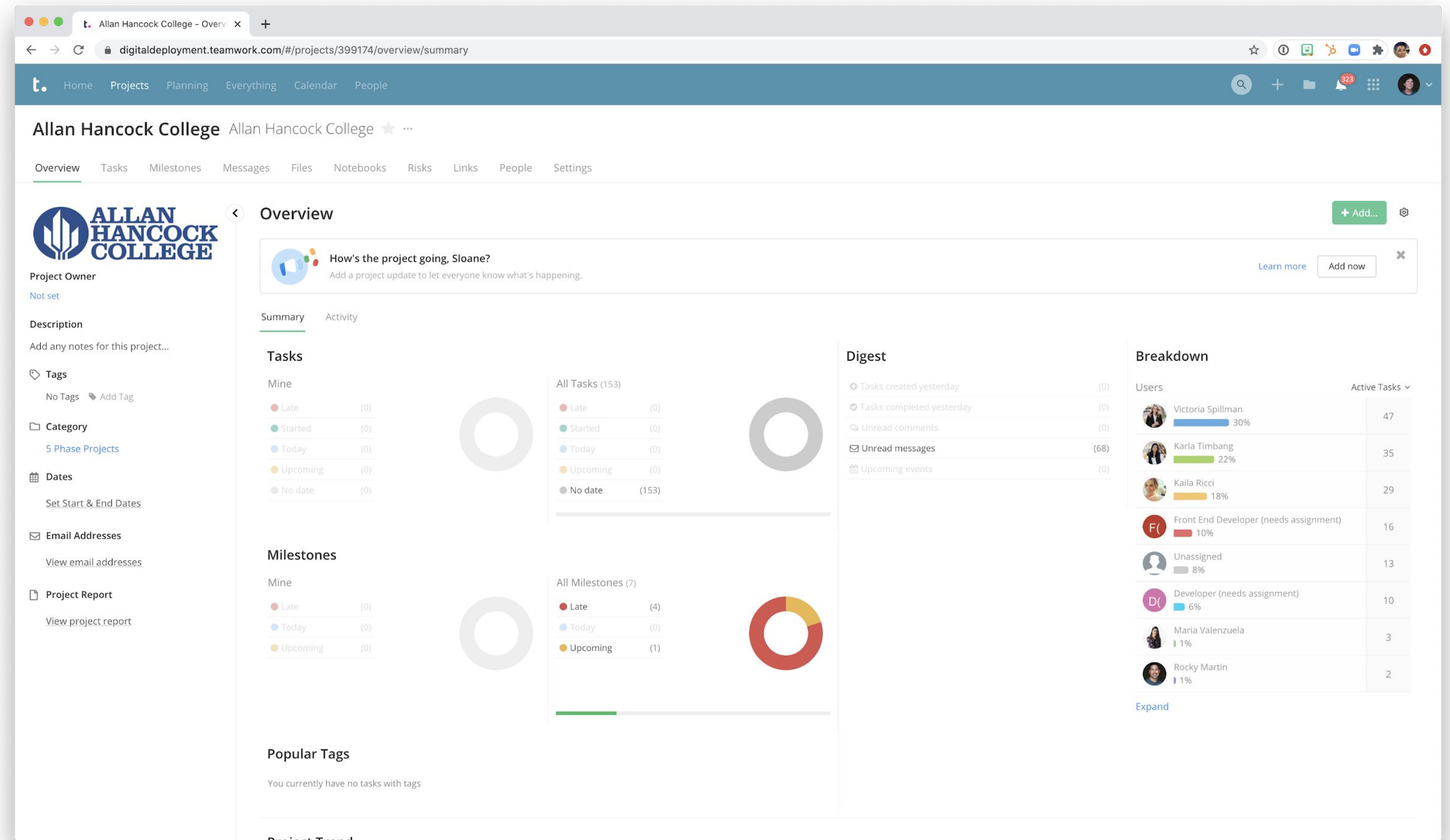Free option (not just trial)
True "PM" options / views
It's the software our parent co. uses

Dislikes:
Way more visuals than we ever used…
and they don't mean much at a
glance
Probably overkill for most districts

Project Management tools

Monday.com

Basic

$8 Per seat Per month

Total $24 / month
Billed annually

[Try for free]

For a small team to execute basic work smoothly

Basic Includes:

Forms ⓘ
Communication with context ⓘ
Unlimited free viewers ⓘ
iOS and Android apps ⓘ
Dashboards ⓘ
(1 board per dashboard)

Standard *Most Popular*

$10 Per seat Per month

Total $29 / month ⓘ
Billed annually

[Try for free]

For a single team to visualize, run, track and improve their work with confidence

Basic features, plus:

Timeline & Calendar views ⓘ
Share boards with guests ⓘ
Advanced search ⓘ
Automations ⓘ
(250 actions/month)
Integrations ⓘ
(250 actions/month)
Dashboards ⓘ
(3 boards per dashboard)

Pro

$16 Per seat Per month

Total $48 / month
Billed annually

[Try for free]

For teams to streamline and control complex workflows and operations

Standard features, plus:

Private boards ⓘ
Chart view ⓘ
Time tracking ⓘ
Formula column ⓘ
Automations ⓘ
(25,000 actions/month)
Integrations ⓘ
(25,000 actions/month)
Dashboards ⓘ
(10 boards per dashboard)

Enterprise

[Contact Us]

For organizations seeking enterprise-grade project and workflow management

Pro features, plus:

Enterprise-scale ⓘ
Automations & Integrations
Enterprise-grade security ⓘ
& governance
Advanced reporting ⓘ
& analytics
Multi-level permissions ⓘ
Tailored onboarding ⓘ
Premium support ⓘ
Dashboards ⓘ
(50 boards per dashboard)

One platform, better teamwork.

Highly effective teams choose monday.com to manage their work

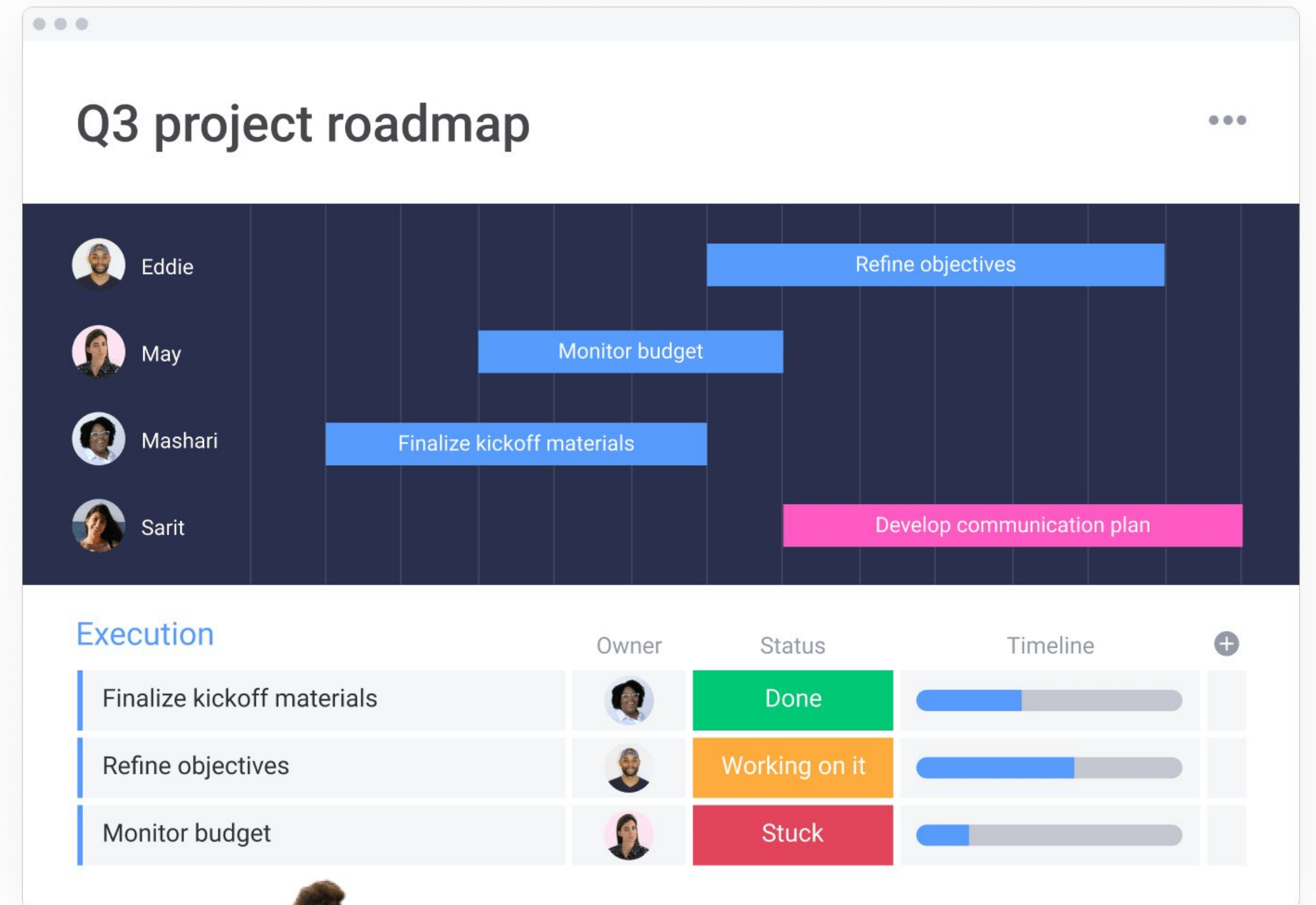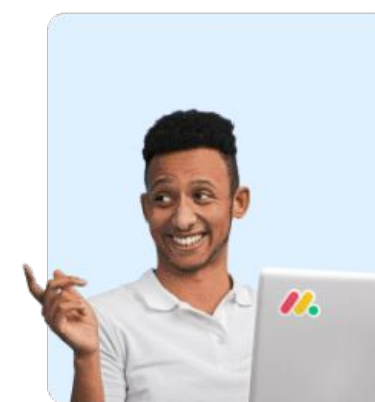[Get Started >]
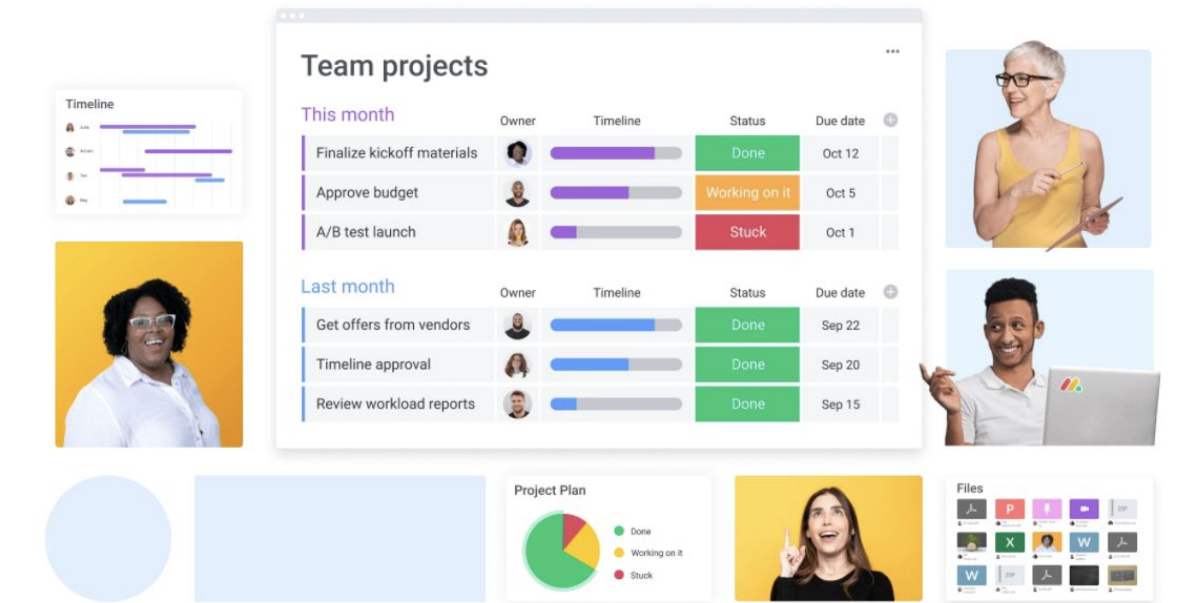
Project Management tools

Monday.com

Likes:
Includes project templates to get started
Great for "real" project management (roadmaps, etc)
Very visual and colorful!

Dislikes:
More bells and whistles that a typical project needs
(which just makes it confusing)
No free option (although there is a free trial period)

Q3 project roadmap

Eddie		Refine objectives
May	Monitor budget	
Mashari	Finalize kickoff materials	
Sarit		Develop communication plan

Execution

	Owner	Status	Timeline
Finalize kickoff materials		Done	
Refine objectives		Working on it	
Monitor budget		Stuck	

Project Management tools

So … much … information …

Takeaway: just do a free trial of anything that seems like it might work for you!

What tools have you used?

Project Management tools

RECAP

Project Management vs. Project Leadership:

Project Management gets things done.
People have to get onto the yellow bus to travel where they need to go.

Project Leadership makes things happen.
People hear the driver of the purple bus talking about the destination, and they want to go!

Recap

Explore the "why"

- Simon Sinek: Start with Why (TED talk, book)
- Explore your purpose exercises:
  - Your organization's noble cause
  - Your own noble cause
  - Your project's "why"
  - User stories

Recap

Brainstorming ideas: Convergence, Divergence, and getting the best ideas in the room

- Use formal brainstorming tools to come up with a lot of creative ideas
- Use "convergent" processes to narrow and combine ideas
- Iterate again if needed - especially for specific ideas that are compelling

See IDEO resources and "A Whole New Mind"
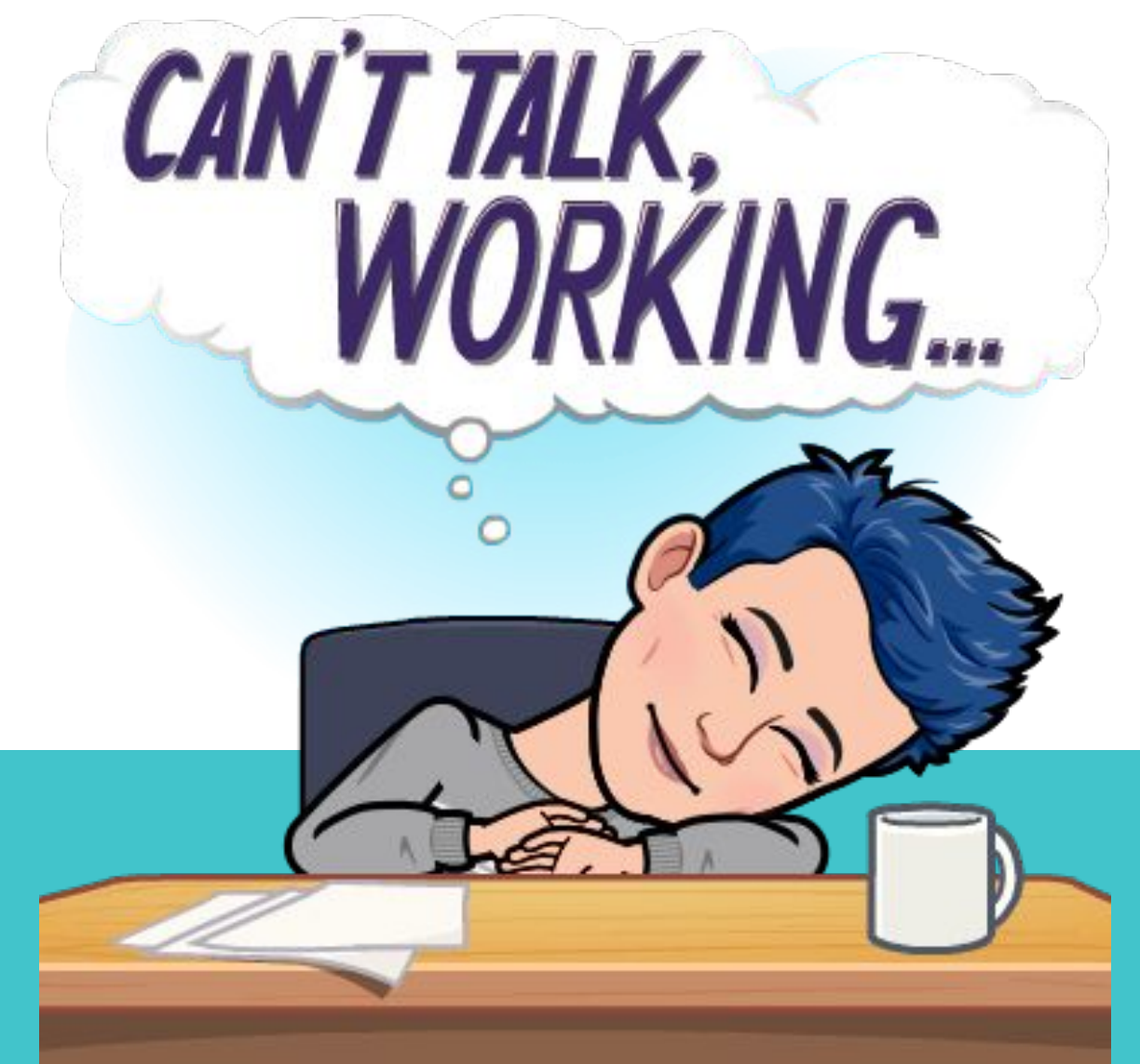
Recap

Building public support:
Getting buy-in and anticipating the public's reaction

- Do the research - consider financial and reputational impacts
- Anticipate resistance - brainstorming and surveys can help
- Wait until you're ready - don't casually talk about it,
  prepare a thoughtful presentation

Recap

Executing and staying organized

- There are a variety of great tools out there. A few include:
    - Trello, Asana, Basecamp, Teamwork, and Monday.com
    - You might not need anything more than Docs and Sheets though!

CAN'T TALK, WORKING...

Recap

Pop Quiz for prizes!

In chat to all, name one "do" and one "don't" of brainstorming

Prizes!

This webinar is provided for general information only and is not offered or intended as legal advice. Attendees should seek the advice of an attorney when confronted with legal issues and attorneys should perform an independent evaluation of the issues raised in this webinar.

**California Special
Districts Association**

Districts Stronger Together

CSDA

**PROFESSIONAL
DEVELOPMENT**