



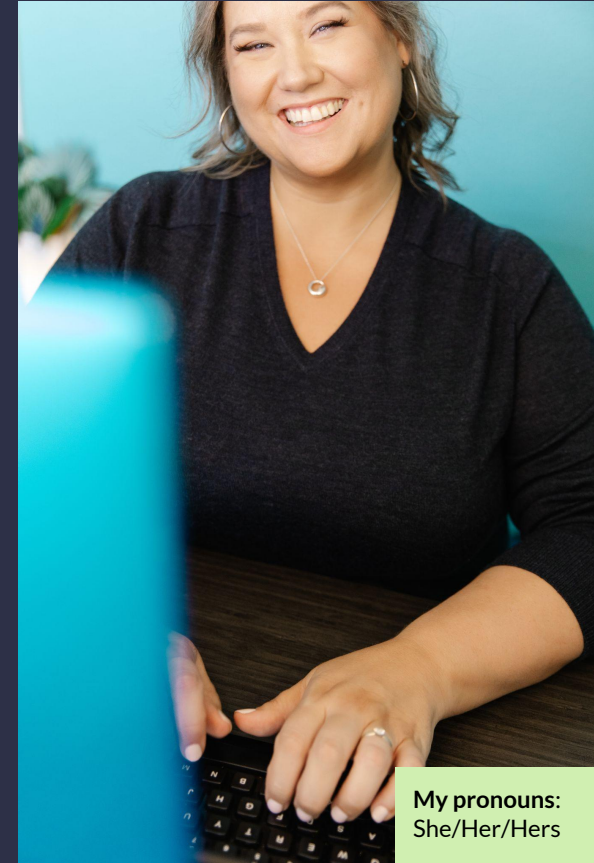
# 8 Practices of Great Project Management

With a partner, share the most mischievous thing you did as a kid.

# Hello!

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- Most people call me Jess.
- I have two kids, aged 8 and 10.
- I grew up around the world in a military family. After my parents got divorced the rest of my childhood was in Alabama so I'd call that "home".
- I've been in the SF Bay Area now for 20+ years.
- I started my career as a classroom teacher and then started a nonprofit education advocacy org where I served as Chief of Staff and then Executive Director for 11+ years.



My pronouns:  
She/Her/Hers

**Email Coming Later** : later this week, I'll share resources and the slides I'm using with you via email to Jenni that she can share with you.



— Today is a  
workshop, and  
here's what I mean  
by that.

**What's a project  
you're playing a key  
role in right now?**

- **What statements of leadership from the last session do you want to bring to your project management?**
- **Are there any insights from your 360 that you want to bring with you to this session?**

# Let's dive into 8 best practices of project management.

We will take a 1-hour break about halfway through today!



**BEST PRACTICE #1:**

**Define Success**



# 1. Define Success (and share with everyone involved)

- Research is clear that well-written goals increase **motivation, clarity, and achievement.**
- Imagine what a **total home run** would look like for this project. **Imagine what's possible & think big!**



# 1. Define Success – Examples

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- Examples of Specific Project Goals:

- *“Our fall 2024 Dance Festival will showcase diverse dance styles, talents, and cultural influences, while ensuring the safety and enjoyment of both performers and the audience. At least 400 attendees will be present, and we secure at least \$15K in event sponsorships.”*
- *“By November 1, 2024, Status: Home has an accepted offer for their next CEO. The feedback we receive from staff and the board of directors is at least 85% positive, and in the next year they hire us for another project and/or make a recommendation for us to a fellow organization. Staff working on the project directly share that it felt sustainable and that timelines were reasonable. We build a pool of at least 20 qualified candidates, and maintain solid relationships with those that are not hired to support future searches that we run. All logistics throughout the process (document access, invoicing, scheduling) are seamless.”*

- Non-Examples:

- *“We will give out all of our grant money for this quarter.”*
- *“Fellows will be satisfied with the experience they get with their mentors.”*
- *“We will hold a retreat for our staff on December 8 and 9”*

# 1. How to define success and share with everyone involved

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- Are there timelines that are part of success?
- Is there feedback you'll be collecting?
- Can you incorporate process goals?
- Is there something to say about logistics?
- Can staff experience be incorporated?
- What would short- and long-term success look like for this project?
- Who needs to see this written clarity of the project's success? Who needs to give input on ensuring we've defined success simply but clearly?

**Goals Bank coming via email as a resource.**

The trick in creating qualitative goals is to tap into the instinct that you would “know success when you see it” and to articulate the specifics beneath that instinct. You want to establish a bar for expectations and create a standard by which reasonable people should be able to agree on whether or not the goal has been met.

**Write or improve the definition of success for a project you're leading, will lead, or are playing a role in right now.**

**BEST PRACTICE #2:**

**Clarify Roles &  
Decision-Making  
Processes**

## 2. Clarify Roles (in writing)

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- What roles will team members be playing? What about clients? Get written clarity and share it in a place that everyone can review, discuss, and agree.
- There are tools you can use for this, like MOCHA or RACI.
- For larger projects, you might use a more complex set of tools like sub-MOCHAs.

# MOCHA:

More MOCHA resources coming via email.

**MANAGER** : Assigns responsibility and holds owner accountable. Makes suggestions, asks hard questions, reviews progress, serves as a resource, and intervenes if the work is off-track.

**OWNER** : Responsible for overall success of the project, assigns tasks, manages deadlines, ensures that work gets done. There should only be ONE owner.

**CONSULTANTS** : Available with information as needed.

**HELPER** : Responsible for some of the work associated with the project.

**APPROVER** : Signs off on decisions before they are final. Could be the manager, though might also be the executive director, external partner, or board chair.

# Sometimes you can simply name who leads on which area.

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<b>Annual Gala Area of Ownership</b>	<b>Lead</b>
Graphic Design, Donation Processing, & Childcare	Daisy
Live Auction & Event Program	Vince
Catering & Bar	Yanira
Venue	Ezra
Guest List and Sponsorships	Jonathan
Social Media, Traditional Media, & Photography	Wendell

*Do not let the perfect be the enemy of the good. Even 5 minutes in a meeting defining who leads on what is a meaningful exercise. When unclear moments mean it's not clear who is responsible, name that and have a conversation to decide who will own what.*



**Create a draft of project roles for a project you're leading.**

**and/or**

**Jot down areas where ownership is not currently clear and bring to a future meeting to get clarity.**

Another key part of  
role clarity is  
decision-making  
clarity.

# Which is most true for your team?

**A -**

**The team is super-clear on how decisions will be made across the organization.**

**B -**

**There's sometimes confusion on who decisions and how the decision-process works.**

**C -**

**There's often confusion and/or strife about the decision-making process. It's not going well.**

# Do any of these ever happen at your org?

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- The leader takes over when the discussion gets uncomfortable.
- The power players decide (louder, taller, whiter, male-er).
- Meetings go long; discussions drag on.
- Some people think a decision was made; others don't think so.
- Quiet members feel unheard and ignored.
- Whoever spoke last when the time runs out becomes the decision maker.
- The subject gets put off for yet another time.

# 6 Types of Decision-Making Approaches

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1. **Coin Toss** (where to go for lunch, what topic to discuss first when both are equally important)
2. **Leader Decides Without Input** (your personal schedule, urgent emergencies like “get out now” if there’s a fire in the building with campers)
3. **Leader Decides After Input** (new software, agenda items)
4. **Majority Vote** (impending deadline for a decision that needs buy-in for successful implementation, like venue to pick for the fundraiser)
5. **Agreement or Consensus** (long-impact decisions that need broad team buy-in for successful implementation like saying yes to a major new program; this is the gold standard if you can make it happen)
6. **Delegation** (a leader delegates decision power to someone else, who then chooses one of the above approaches)

# A tool if you're aiming for consensus:

## Check for agreement w/ Sam Kaner's Gradients of Agreement

1	2	3	4	5	6	7	8
<b>100% in agreement!</b>	<b>Agreement, w/ minor point of contention</b>	<b>Support with reservations</b>	<b>Abstain</b>	<b>More discussion needed.</b>	<b>Don't like, but will support.</b>	<b>Serious disagreement</b>	<b>Veto</b>
<i>"I really like this."</i>	<i>"It's not perfect, but it's good enough."</i>	<i>"I can live with this."</i>	<i>"This issue doesn't impact me."</i>	<i>"I don't understand this well enough yet."</i>	<i>"It's not great, but I don't want to hold up the group."</i>	<i>"I am NOT on board. Do not count on my support."</i>	<i>"I block this - we need to start over."</i>

Consider the proposal at hand. Consider where you are on the scale. If you have reservations, please be ready to share what the group could change to help you move down the scale.

# 6 Types of Decision-Making Approaches

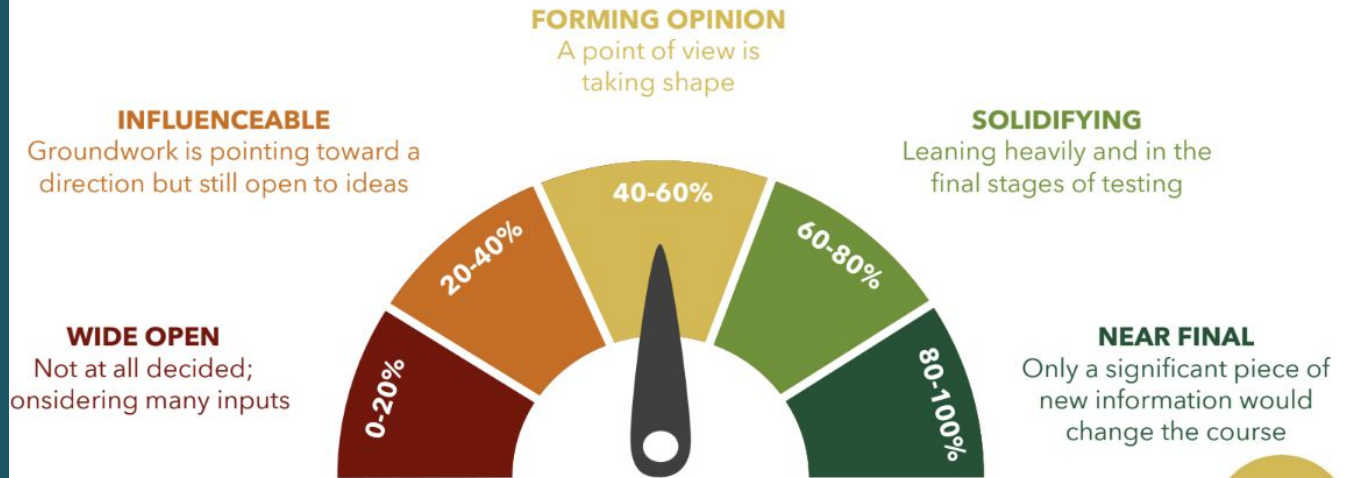
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Which of these do you want to use more often in your work, and for what kinds of decisions?

# A tool for communicating transparently about the current state of a decision process:

## DECISION DIALS

A way to gauge how close the decision is to final, according to the **decision-maker**.





**BEST PRACTICE #3:**

**Attend to Culture**

I know that you  
believe culture  
matters!

# 3. Attend to Culture

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Research is clear: **team culture at work really matters.** MIT studied the 10 most important team culture elements across 1.4 million employees and found these are the top 2:

- 1. Employees feel respected.** Employees are treated with consideration, courtesy, and dignity, and their perspectives are taken seriously.
- 2. Supportive leaders.** Leaders help employees do their work, respond to requests, accommodate employees' individual needs, offer encouragement, and have their backs.

Your project will be much more successful if the stakeholders feel respected and supported by you as the project manager.

Culture  
eats  
strategy  
for breakfast.



# 3. Attend to Culture By Managing Up Effectively

- **If your project management plate is full** and getting more piled on top, ask (or better yet, propose!) what you should prioritize “this morning/afternoon” to clarify the priorities.
- **Directly ask** - how are things going with my management of X project? I’d love your input on how I can continue to grow as a leader.
- **When you’re being ignored** - If you are not getting the time/attention/responses you need, don’t keep trying the same approach - switch it up.
- **Bring solutions** - whenever possible, don’t just bring challenges. Bring potential solutions and/or recommendations for how to solve the issue.

### 3. Attend to Culture By Managing Laterally

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- Prioritize relationship-building
- Don't hide the ask
- Acknowledge the awkwardness if it exists

# 3. Attend to Culture Through Appreciation

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Variations in answers to this question: "*In the last seven days, I have received recognition or praise for doing good work*" is responsible for a 10% to 20% difference in revenue and productivity. Appreciation during the project can take many forms:

- Shout-outs in Slack Or Google Spaces for project participants making progress on something or going above-and-beyond.
- A section of the weekly project meeting set aside for teammates sharing appreciation for each other.
- The project lead including appreciations in every weekly update email.
- Setting aside a little budget for appreciation tokens (coffee gift cards, small but meaningful bonuses, etc.)
- Appreciation as a section of a final wrap-up meeting after the project is complete.

Got any appreciation practices already in place? Let's share those!

**Jot down how you will approach appreciation for your projects, how you will gather feedback from stakeholders, and how you will build relationships across the project team.**



**APPRECIATION  
AT WORK  
TOOLKIT**

*from Jessica Eastman Stewart*

[jessicaeastmanstewart.com/appreciation](https://jessicaeastmanstewart.com/appreciation) (it's free)



# **BEST PRACTICE #4:**

**Organize Your  
Information**

# 4. Organize Your Information

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What tools are you already using for this for your camp?

**You will need 2 systems for just about any project you lead:**

- **A place to track tasks** with ownership and due dates (Asana, Trello, Google Sheets, etc.)
- **A place to keep lists & links** (Google Sheets, Slack, Google Spaces)

**Taking time to get these organized at the outset of a project is an incredibly valuable investment of your time and often takes less time than you might imagine.**

# 4. Task Tracking

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**Any task-tracking system should include:**

- What the task is
- Ownership of the task
- Due date for the task

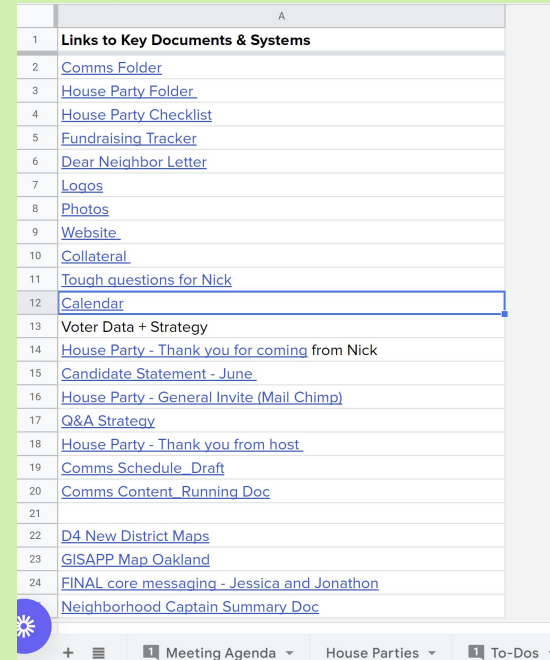
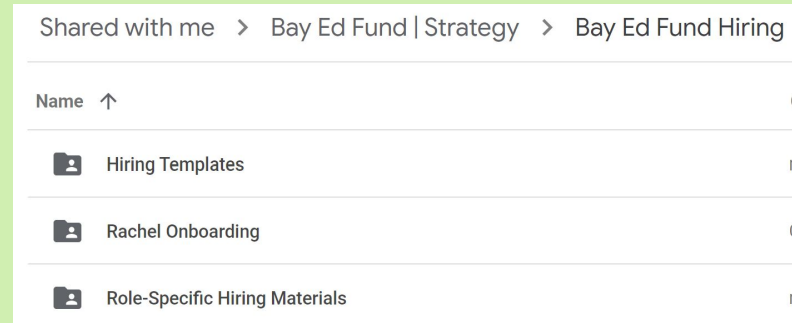
**It might also include:**

- Notes or links for the tasks
- Status of the tasks
- Category of the task

# 4. File & Link Organizing

Files for a project can be organized in a few different ways:

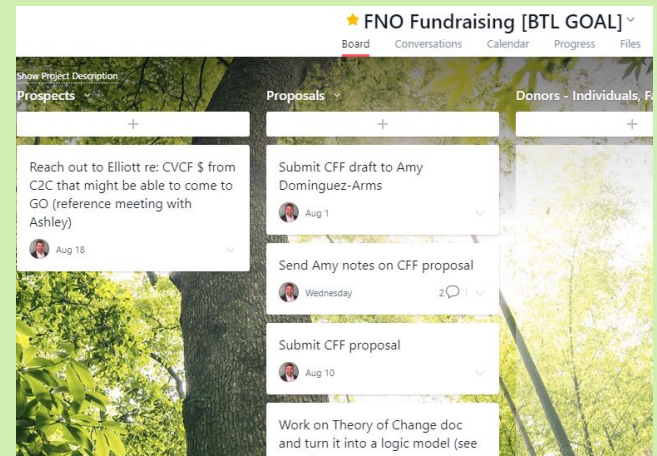
- A folder in a tool like Google Drive where all files (or shortcuts) are kept together. Potentially there are subfolders for additional organization.
- A place where links to documents/systems/pages are captured, and they might or might not be all located in the same place.



# 4. Project HQs

All-in-one tools like project management software can be created to manage most aspects of a project.

Google Sheets can also serve this way.



A	B	C	D	E	F	G
SF REPORT HERE:	<a href="#">LINK</a>	Completed Shifts			Today is 6/15/2022	
OC REPORT HERE:	<a href="#">LINK</a>	515			Election Day is 11/3/2020	
Texts + Phones Last Updated by Jess	11/5	Vols with Completed Shift			Weekdays until Voting Ends -422	
OC Last Updated by Yanira	10/26	155			Weeks until Voting Ends -84.1	
Strategies, in order of priority	Count	Completed Shifts	Flaked/Not Completed Shifts	Goal	Commitments % to Goal	Completions % to Goal
1. Phone Banking	138	85	53	240	58%	35%
2. Outreach Circle	88	44	44	60	147%	73%
3. Postcards	265	245	20	200	133%	123%
4. Texting	54	26	28	25	216%	104%
5. Yard Sign Delivery	29	29	0	25	116%	116%
6. Last Weekend Doorhangers	106	77	29	100	106%	77%
7. Election Day Visibility	16	9	7	20	80%	45%
COMMITTED SHIFT PROGRESS TOWARDS GOAL (This week's goal is 695)	696	515	181	670	104%	77%
Total Individual Volunteers	198			200	99%	
Volunteer Racial Diversity - % BIPOC	162%					

**Draft a list of ideas for improving the organization of information for a project in which you're playing a role.**

**BEST PRACTICE #5:**

**Realistic Timing**

# 5. Get Clear on Timing & Plan for Hiccups

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Starting with your definition of success, plan backwards from the end of the project to determine the parts of the project and start to put them “in time”.

Look at the calendar for things that might impact your project:

- Another big project that might impact capacity of key stakeholders inside the department or with partner organizations.
- Vacations or leaves for key stakeholders.

And then plan for hiccups - someone will be out sick, finding a venue will take longer than expected, partner organizations will move slower than they promised, etc. You can do this by building in buffers for every step of the project - you think this part will take one week? Assume 10 days.



**Looking at the phases of your project, estimate how long it will take (1 wk, 1 month, 2 days).**

**and/or**

**Take a look at your team's calendars to find things that might throw a wrench in your plans.**

**and/or**

**Map out the timeline for a project you're leading.**

**BEST PRACTICE #6:**

**Updating Stakeholders**

# 6. Update Stakeholders

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Keep stakeholders (internal and external) updated on what's happening with the project. This can take many forms:

- A project-specific Slack channel or Google Space where updates, links, and discussions are had.
- A weekly meeting about the project where owners share updates on their portions of the project and everyone leaves with clarity on what success looks like in the coming week.
- A weekly email sent by the project owner with updates and what's coming next.

Are you already doing this in a systematic way? If so, tell us how!

**What approaches do you want to try to keep stakeholders in your project updated about how things are going?**

**What content will you include in these updates or meetings?**

**BEST PRACTICE #7:**

**Templates & Checklists**

# 7. Secret Weapon: Checklists & Templates

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Checklists save lives.\*

Often, projects are run in a similar fashion over and over again. Some things change, but the big-picture and many of the small details remain the same.

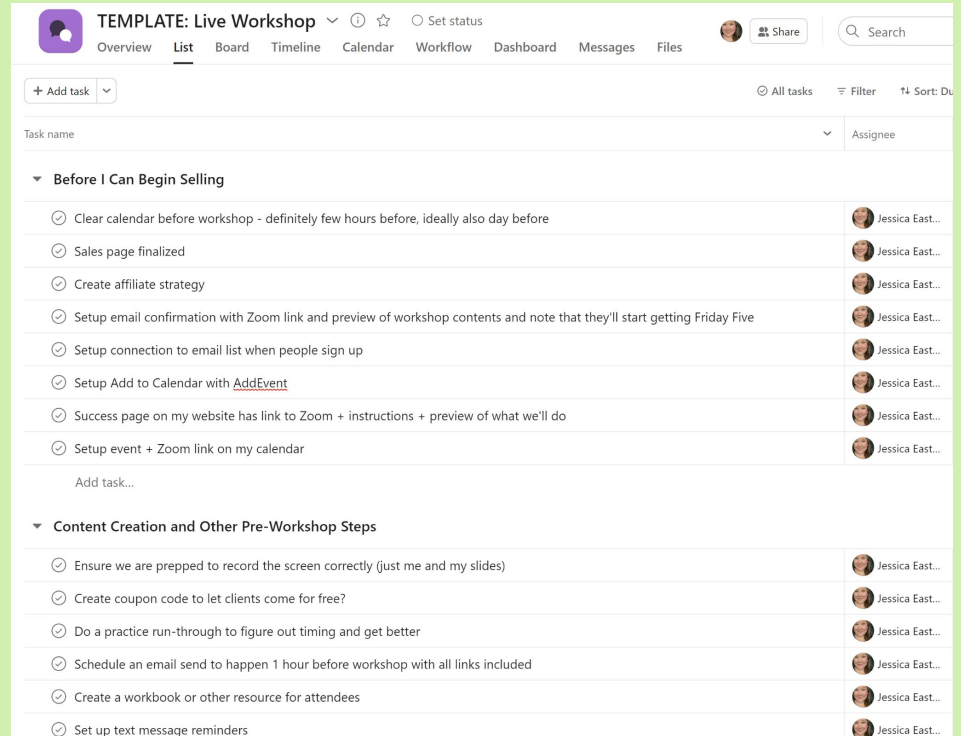
- Hiring processes
- Client onboarding
- Annual budget-setting
- Annual goal-setting
- Staff retreats
- Staff onboarding
- Recurring public events

*\*The Checklist Manifesto by Atul Gawande.*

# 7. Secret Weapon: Checklists & Templates

When you run a project that is likely to be run over and over again, take the time to create a template for that project.

Do you already have some checklists you use at work? What are they for?



**What are some  
checklists or templates  
that would be valuable  
in your work?**



**BEST PRACTICE #8:**

**Debrief and Preserve**

# 8. Debrief & Preserve

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At the outset of a project, put a meeting on the calendar at the end of the project to be sure you make time to debrief the project and preserve your learnings and content to benefit your future work.

- Create templates that can be used in the future
- Update templates you used for this project to be better given your learnings
- Appreciate stakeholders
- Get feedback to improve the process next time
- Organize the files so that they are easily findable when you or others need them in the future

How do you want to  
approach debriefing  
your projects this  
year?

# Discuss:

Which of these 8 areas are you feeling most excited to take next steps to take to the next level?

What barriers are you anticipating to making these improvements you have in mind?

# Q&A

## 8 Practices of Great Project Management

1. Define success
2. Clarify roles
3. Attend to culture
4. Organize your information
5. Realistic timelines
6. Updating stakeholders
7. Checklists and templates
8. Debrief and preserve