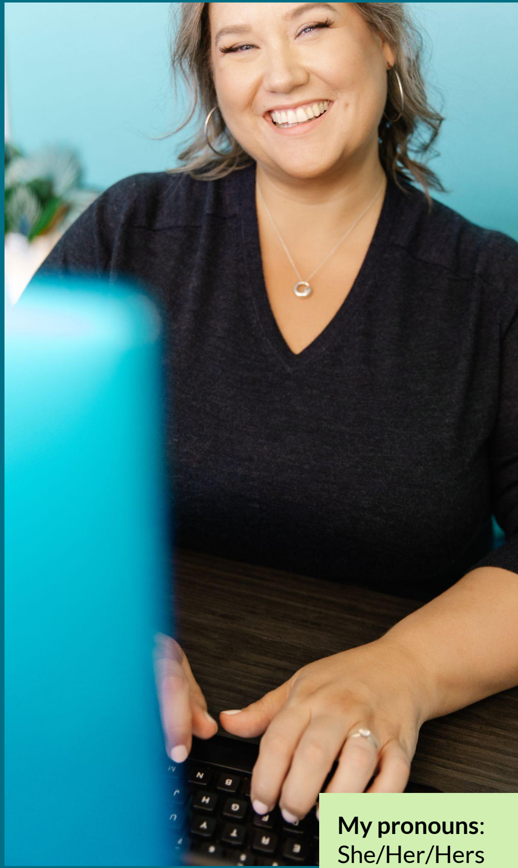
Joyfully Managed Life
JESSICA EASTMAN STEWART

8 Practices of Great Project Management

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

Hello!

- Most people call me Jess.
- I have two kids, aged 9 and 11.
- I grew up around the world. 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. My professional background is as a nonprofit Executive Director.
- I have an extraordinarily bad sense of direction.
- My 3 favorite things are sleeping, tidying up my Little Free Library, and talking about getting organized.



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 and Molly that they can share with you.

Today is a **workshop**, so we'll have several **mini work blocks** to give you momentum on applying what we're exploring together.

Project: a set of tasks connected to each other, usually with an end date.

Project examples: an event, a website revamp, a grant application, onboarding a new staff member.

These best practices also work well for ongoing **processes**, which might not have an end date.

Process examples: office supplies, financial management, staff management, social media.

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

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

We will take a 30-min 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!**

Define Success - Non - Examples

- "We will hire all of our summer staff before camp starts."
- "We will upgrade the girls' cabins this spring."
- "We will hold a post-camp retreat for our staff on August 1 and 2."

Define Success - Better Example

"Our summer 2026 hiring process results in full staffing by no later than May 15th. At least 60 applications are received for our counselor spots (and 40% of those are from camp alumni). We use as many of our strong 2025 hiring materials and checklists as possible and improve them along the way. All HR paperwork is completed for summer staff by May 29th, and each summer hire has received a welcome package with a personal note from Jon by June 5th."

1. How to define success and share with everyone involved

- 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)

- 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.

Annual Gala Area of Ownership	**Lead**
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?

- 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

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)

6 Types of Decision-Making Approaches

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

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.

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
100% in agreement!	**Agreement, w/ minor point of contention**	**Support with reservations**	**Abstain**	**More discussion needed.**	**Don’t like, but will support.**	**Serious disagreement**	**Veto**
“I really like this.”	*“It’s not perfect, but it’s good enough.”*	*“I can live with this.”*	*“This issue doesn’t impact me.”*	*“I don’t understand this well enough yet.”*	*“It’s not great, but I don’t want to hold up the group.”*	*“I am NOT on board. Do not count on my support.”*	*“I block this - we need to start over.”*

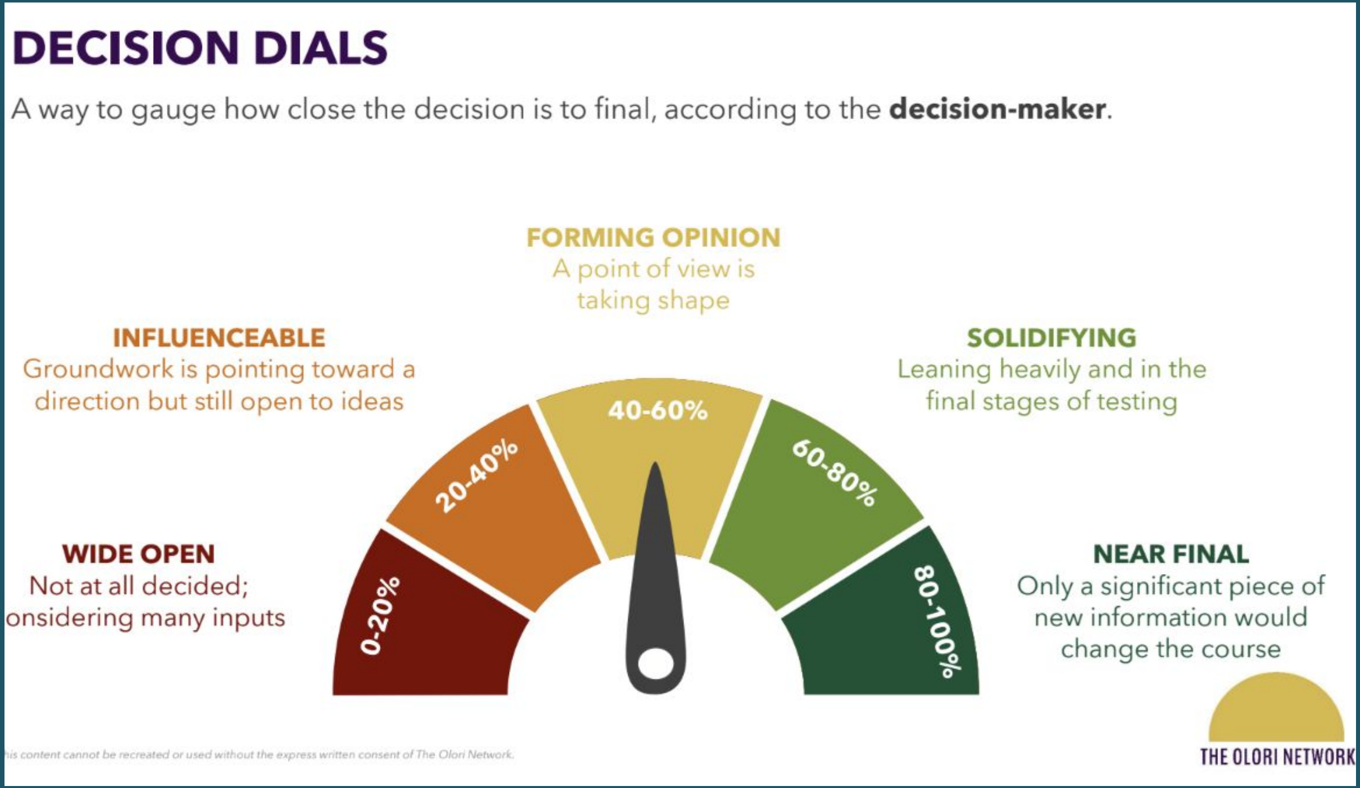
Consider the proposal at hand. Consider where you are on the scale. If you have reservations, please be ready to share what the group could change to help you move down the scale.

6 Types of Decision-Making Approaches

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)

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:



BEST PRACTICE #3:

Attend to Culture

I know that you believe culture matters!

Attend to Culture

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.

Attend to Culture Through Appreciation

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!

jessicaeastmanstewart.com/appreciation (it's free)

How Is Managing Up & Laterally Going for You?

A

Not Well - I am often held back by not getting what I need to move forward from those “above” me in the organization.

B

It’s okay but could be better - I sometimes have to wait for things I need, and/or I’m not always clear what I have approval to move forward on my own.

C

It’s great - the folks “above” me in the organization are clear about what I can decide and take actions they need to take when they need to be taken.

Manage Up Effectively

- **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.

Managing Laterally

- **Prioritize relationship-building.** Every challenge you encounter is going to go more smoothly when folks have a human relationship with each other.

- **Choose the right tasks to delegate.** Only delegate work that fits your peer's domain, advances their goals, or uses their existing tools. Misaligned asks feel like favors and are likely to get a quick "no."

- **Frame it as a shared opportunity.** Start with context, not commands. Acknowledge their expertise and position the work as a mutual win: "Would it make sense for your team to own this going forward?" Keep the tone collaborative.

Managing Laterally

- **Create accountability together.** Get clear on timelines and roles. Ask, “What check-ins work for you?” or “What’s a realistic timeline?” When needed, be up front about hard deadlines. After the conversation, follow up with an email summarizing the agreements you’ve made.

- **Address pushback with curiosity.** If you hear hesitation, ask why: “What concerns do you have?” or “What’s your team juggling right now?” Use their input to revise scope or timing without forcing the issue.

- **Follow up without overstepping. I**nstead of “Is this done?” which can make them feel like you’re checking up on them, ask “What obstacles can we help clear?” Revisit shared agreements if needed, and keep things moving—respectfully.

Jot down action items for how you want to take appreciation to the next level or improve lateral or upward management in your work.

BEST PRACTICE #4:

Organize Your Information

Organize Your Information

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

This doesn't need to be overly-complicated or overly-organized.

Organize Your Information

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

- A **place to track tasks**
- A **place to keep lists & links**

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

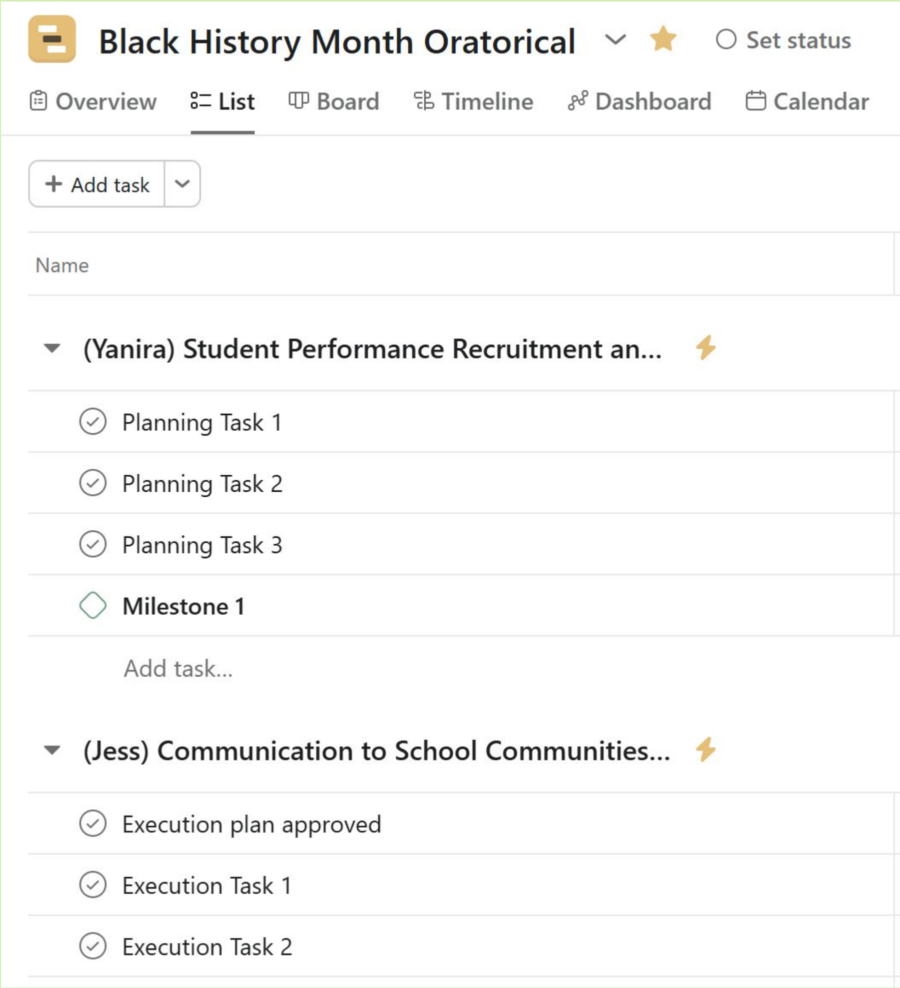
Task Tracking

Key must-haves:

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

It might also include:

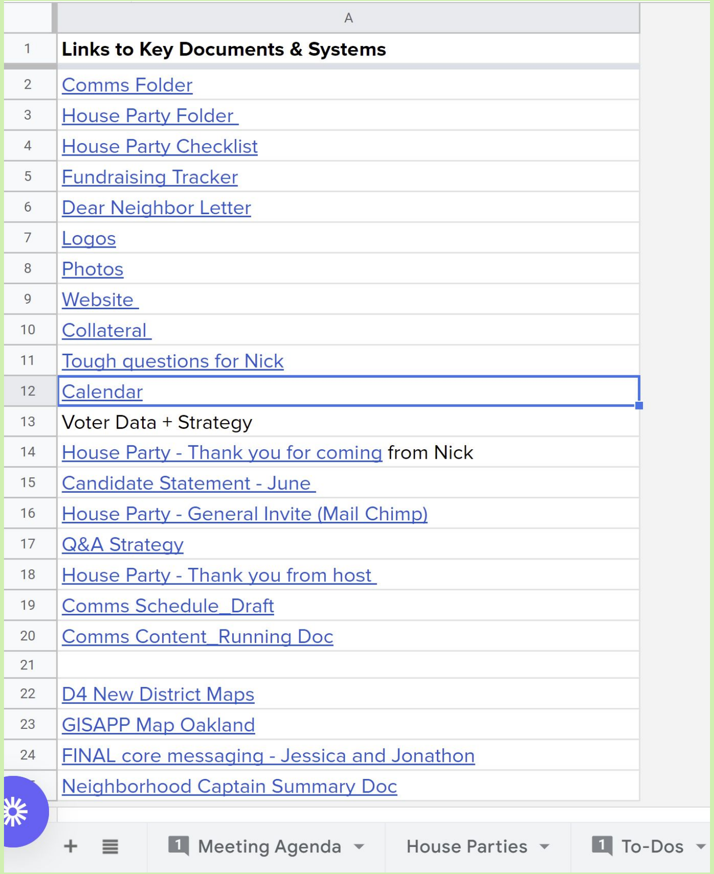
- Notes or links for the tasks
- Category of the task
- Priority of the task



Lists & Links

Things To Organize in Some Way:

- Project Success Definition
- Roles
- Links (to files, folders, websites, other online systems you are using, etc.)
- Lists (of people, materials, events, etc.)



	A
1	**Links to Key Documents & Systems**
2	Comms Folder
3	House Party Folder
4	House Party Checklist
5	Fundraising Tracker
6	Dear Neighbor Letter
7	Logos
8	Photos
9	Website
10	Collateral
11	Tough questions for Nick
12	Calendar
13	Voter Data + Strategy
14	House Party - Thank you for coming from Nick
15	Candidate Statement - June
16	House Party - General Invite (Mail Chimp)
17	Q&A Strategy
18	House Party - Thank you from host
19	Comms Schedule_Draft
20	Comms Content_Running Doc
21	
22	D4 New District Maps
23	GISAPP Map Oakland
24	FINAL core messaging - Jessica and Jonathon
	Neighborhood Captain Summary Doc

When Project Management Software* Shines

...and when something else might be just as good or better

Software tools shine ✨

- Recurring processes and projects
- Recurring tasks (daily, weekly, monthly, quarterly, annually)
- Collaborative projects

Software tools are about as good as other approaches 👍🏽

- Tasks captured in a meeting
- 1:1 Check-in agendas
- Your individual to-dos

**such as Asana, Monday, Trello, Basecamp, etc.*

How do you decide what project management tools to use?

Considerations	My advice
What is already in use	Supporting teams to adopt new tools is a project in and of itself. It can be very worth it but it's also going to be bumpy and requires capacity and time that you might not have.
Complexity of the tool	Simple is often better. Powerful tools are also powerfully confusing for new users. If there are 25 straightforward next steps to track, a list in a document or on a whiteboard might be more useful than project management software.
Your stakeholders	A team of full-time staff might have more capacity to learn and use a powerful tool than a mixed team of volunteers or coalition partners, for example.

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

Get Clear on Timing & Plan for Hiccups

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

"A lack of communication is a lack of performance."
- Sam Corcos

6. Update Stakeholders

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

Secret Weapon: Checklists & Templates

Studies show that our brains can reliably track only about 7 items at once before errors creep in. This limitation affects all of us whether we’re surgeons, busy parents, software engineers, or project managers.

The humble checklist is therefore a cognitive lifeline for both our stress and our effectiveness.

7. Secret Weapon: Checklists & Templates

Also, 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.

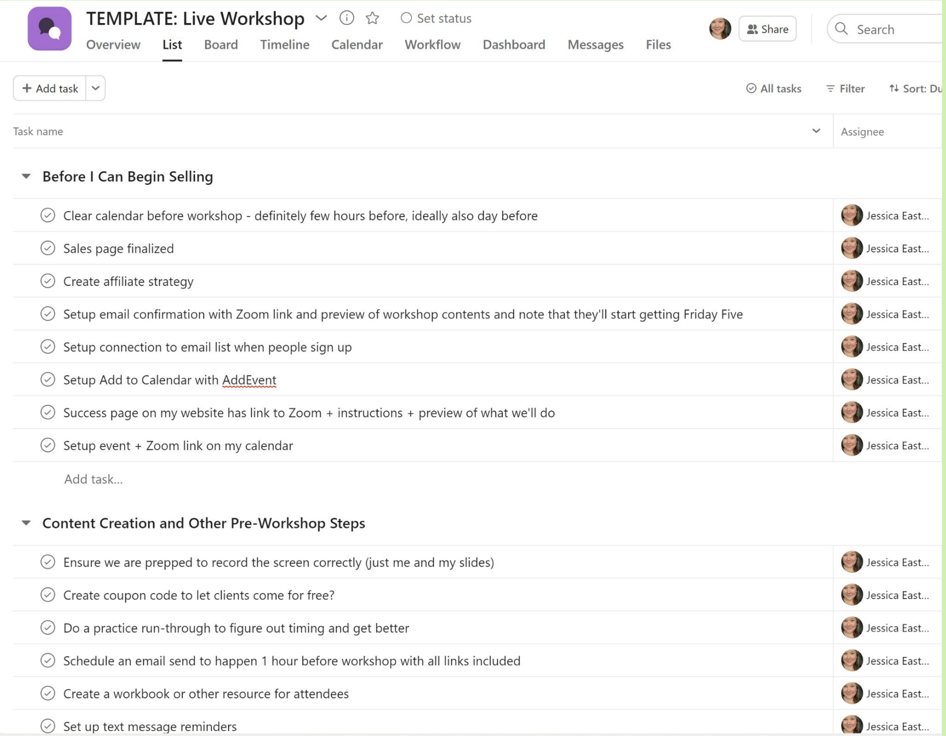
- Hiring processes
- Client onboarding
- Annual budget-setting
- Annual goal-setting
- Staff retreats
- Staff onboarding
- Recurring public events

**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

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

Debrief Meeting Tips

- **Set the Right Tone** - Create a blame-free environment focused on learning rather than finger-pointing. Emphasize that the goal is improvement, not criticism. Make it clear that honest feedback is valued and protected.

- **Come Prepared with Data** - Gather objective metrics beforehand - budget variance, timeline performance, attendance numbers, quality indicators, and stakeholder satisfaction scores. Having concrete data helps ground the discussion in facts rather than just opinions.

- **Use a Structured Framework** - Follow a consistent format like "What went well / What didn't go well (or "what could be 10-20% better") / What we learned / What we'll do differently." This keeps the conversation balanced and ensures you cover all critical areas.

Preserve

How will you preserve the best learnings and artifacts of this project for future work your team or organization will do? *Some of this could happen during in your debrief meeting.*

- Create templates that can be used in the future
- Update templates you used for this project to be better given your learnings
- 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

Your honest feedback welcome!

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