

# Project Management for Evaluation

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This article is rated as:

**Evaluation is my main role**

Sometimes managing evaluations can feel like herding cats. Despite your best efforts at nailing down methods, timelines, and other evaluation requirements, plans tend to change, especially if you aren't paying attention.

Evaluators work in multiple environments and just like there's no one-size-fits-all evaluation plan, I've found there's no one-size-fits-all project management solution for managing evaluations.

Based on my experiences and as a self-proclaimed process geek, I've accumulated my top project management tools and strategies to help keep your evaluation projects on track and ensure they meet your stakeholder's needs.



First, there are project management tools – systems and processes that you can use to keep your evaluations on time and on budget.

Using our [evaluation plan template](#) helps you plan your evaluation and is the first set of tools you can use to determine what needs to get done when.

But managing the execution of that plan is where project management tools come in handy.

## Traditional Project Management Strategies

If your evaluation work involves:

- A single evaluation project,
- Firm deadlines,
- Dedicated project staff,
- Internal control of data (i.e., collected, collated, accessed, analyzed by your team)

you can draw from more traditional project management strategies, where specific tasks are assigned to specific people with estimated amounts of time to complete them. Tasks are linked together depending on the order in which they must be completed and generally the evaluation is executed in a linear fashion.

Examples of these more 'traditional' tools include:

- Project timelines or Gantt charts
- Programs like MS project or Forecast that are designed based on assigning tasks with set timelines to specific people
- Progress and status updates

## Agile Project Management Strategies

Once you begin adding more complexity, like:

- Multiple evaluation projects,
- Estimated or loose deadlines,
- Shared project resourcing,
- External control of some data (i.e., evaluation partners are collecting or analyzing data)

traditional tools tend to stop working as well. In my experience, items can easily be forgotten or get off track once the evaluation(s) you manage have these additional elements of complexity. A Gantt chart works well to estimate work, but if deadlines are continually changing, you will need to continually update the chart and add additional tools to your arsenal.

Some of these additional tools can be gleaned from less traditional or 'agile' project management strategies (<https://www.apm.org.uk/resources/find-a-resource/agile-project-management/>). Agile project management was created for managing projects in software development, where management must be adaptive, not anticipatory. Agile projects work in cycles to maintain flexibility and to respond to constantly changing demands. Examples of these tools include:

- KanBan boards; where tasks are moved between three lanes: To Do, Doing, Done
- Programs like Asana or Trello that are designed around creating a list of tasks, then assigning

- Simple tracking documents such as calendars or spreadsheets to keep track of items
- Frequent meetings (some methods advocate for daily!) to divide up work and assess project risks

In one sense, these less traditional methods seem more rudimentary; they're based on the idea of keeping a rolling list of tasks and deadlines, rather than outlining all of the plans and steps at the start.

At **Three Hive**, we work on multiple evaluation projects, some with firm deadlines, some without; we share staff between evaluations based on availability and expertise; and very often we rely on our clients for some or most of the data we use in the evaluation.

Essentially, traditional project management tools and software do not meet our needs. What I've learned from working in this environment a set of principles and strategies that help me to help me juggle competing tasks and demands.

## 1. Be utilization-focused

We have utilization-focused evaluation and I advocate for taking a utilization-focused project management approach. That is, be adaptable and focus on managing the work in a way that makes sense for you, your team, and the evaluation(s) at hand. Don't get hung up on adhering to certain processes and tools if they aren't meeting your needs. If Gantt charts don't make sense for managing an evaluation, ditch them!

## 2. Communication is key

Communicate clearly with both your client and your team. Start communicating early and be consistent. Give people the information they need to help make decisions and be upfront about your constraints. Notify team members and clients ahead of time if you are going to need something from them; assume your project is not at the forefront of their minds and that they will need to be reminded about tasks and deadlines. Manage expectations by being proactive and highlight the risks, benefits, and consequences of action or inaction.

## 3. Don't live and die by the plan

Managing evaluation projects requires responding to change. Being overly rigid in your process, methods, and timelines will lead to you being out of touch with what you are evaluating. Build in space for review and course correction. Unless fidelity to the original evaluation plan is an important measure of success, focus on delivering a quality product and setting up your team for success.

## 4. Redundancy is kind of good

Having redundancy in your project management tools is probably going to happen when you are managing complex projects. I would argue that redundancy in methods is actually a good thing – it serves as a double-check for your project management constraints and assumptions. The key is to find the balance between too much and too little redundancy.

## 5. Use your data

Well, first off, collect it, then use it! Look at past budgets and timelines to help you gain a better understanding of how long certain evaluative activities take. At Three Hive, we use **Harvest** to track our work and monitor budgets. Use that information to constantly improve your project management skills. Ask yourself and your team what could be improved and what worked well after each stage of the evaluation.

For my own use, I use high-level planning tools such as Gantt charts combined with short-term to-do lists and calendar reminders.

Our Three Hive team meets weekly to discuss what is on our plate for the week and our team has an excel spreadsheet outlining upcoming projects and tasks which will require support from various team members. These methods allow for flexible scheduling and prioritization among the team.

I'm sure by the time you, the reader, are reading this article, part of this system will have changed or evolved.

## Be sure to check out our evaluation plan template to get you started in the right direction!

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