

Project management for researchers and evaluators



Introduction to project management

The field of project management offers many tools and tips that can be used to enhance evaluation and research projects

As evaluators, we have a number of goals. We want our work to be valuable, providing useful information to help stakeholders understand community needs, improve programs, promote equity, or shape policies. We want our collaborators or clients to be satisfied with our products and services. We want to effectively manage our work, finishing projects on time on budget, while balancing projects with other obligations.

Most evaluators have had rigorous training in data collection, analysis, writing, and other research skills. Often, we have also developed in-depth knowledge in our areas of practice, such as education, health, or social services. However, we are typically not trained how to manage projects effectively and efficiently.

There is a well-developed discipline related to project management. Much of the discipline is aligned with the project management frameworks and practices established through the Project Management Institute (PMI) and documented in their text, the Project Management Body of Knowledge (PMBOK). On the surface, these practices can seem very formal and not necessarily applicable to research environments or independent consulting firms.

However, project management offers many strategies for strengthening our work. This series of briefs will translate project management strategies into tips for conducting more successful evaluation projects.



What is a “project”?

Not everything we do as evaluators or researchers can be considered as a project. There are several ways to distinguish a project from other work. First, projects are **time-limited or temporary** initiatives. They have a beginning and an end. Ongoing operational efforts, such as marketing your business or supervising staff, are not projects. Second, projects are designed to produce **a unique product, service, or result**. When we conduct a project, we are trying to create or change something, such as sharing new information with stakeholders or creating an action plan based on evaluation results. Much of the actual evaluation or research work that we do involves time-limited efforts to gain and share knowledge, which would qualify as “projects” under this definition.

What is project management?

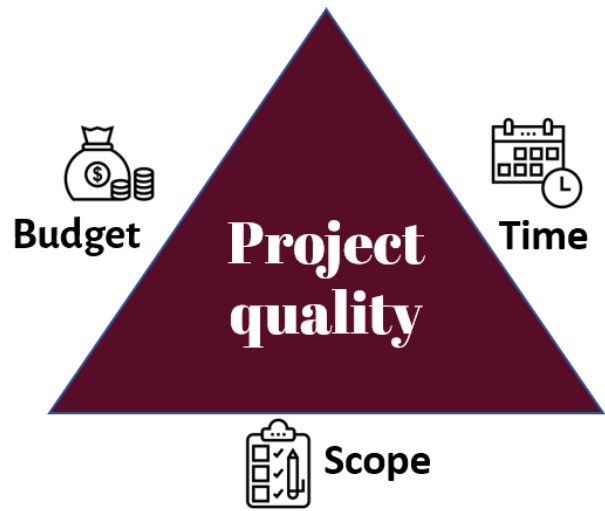
Project management, as defined by the Project Management Institute (PMI), is “the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.” In other words, these are strategies that evaluators can use to make sure that are projects succeed in important ways (such as being completed on time and on budget, meeting stakeholder needs, etc.).

Project management does not need to involve a rigid approach that dictates exactly how projects should be done. As evaluators, we can apply many of the recommended processes in ways that are flexible, responsive to our work place conditions, and aligned with the nature of our projects.

Project management should not be seen as taking time away from actually “doing the work.” The time spent actively managing projects should be well worth it, by increasing the chances that projects will be completely successfully and reducing time spent solving problems with our projects down the road.

What is the “triple constraint”?

Many project management practices are designed to reflect the dynamic interplay between three basic elements: **budget**, **time**, and **scope**. Together, these factors shape the way that we plan and carry out evaluations. It’s important to remember that changing one factor usually means change in the others. For instance, we cannot significantly alter project scope without also considering changes in our budget and timeline. If a client needs to reduce a timeline, we may need to reduce the scope of work to align with the reduced time. Our costs may also change, potentially decreasing due to the reduced scope or increasing if we need to bring in people to help us complete the project faster. Effectively managing budget, time, and scope are fundamental to having a successful project.



PROJECT MANAGEMENT: TRIPLE CONSTRAINT

What are the main project phases?

Projects have five phases. First, there is an **initiation** point, where we start a project and identify the goals, budget, cost, and scope. Second, we **plan** how we will organize the work and identify needed resources. Third, once we have a plan, we can **execute**, or carry out, the project tasks. Fourth, we should **monitor** the project as we go, so that we can **control** our status and make corrections as needed. Fifth, we can **close** the project. These stages may not be as linear as typically depicted. Usually, we are monitoring and controlling the project throughout the other phases, especially execution. Sometimes we need to return to the planning stage to adapt to significant changes in the project.

Subsequent briefs will provide resources and tips for managing each of these project phases!

AUTHOR: Cheryl Holm-Hansen, PhD is the founder and principal consultant at Community Research Solutions, LLC. She has more than 30 years of experience conducting community-based research and evaluation projects. A community psychologist by training, she also has a continuing education certificate in project management.



Take action!

Before jumping into project management details, take a few minutes to think about your definition of “project success.” How does your definition relate to project cost, timelines, stakeholder satisfaction, etc.? What does quality mean to you in your research or evaluation work?



PROJECT MANAGEMENT PHASES