Northeastern University

Best Practices and Templates

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Role and Purpose of Performance Evaluation

Efficient performance tracking is crucial to the success of any project management effort. A crucial component of this procedure is performance reporting, which gives stakeholders a current picture of the project's status. Stakeholder-focused clarity and concision are essential in performance reporting. This can be achieved through methodical and standardized reporting that avoids the use of complicated language that could lead to misunderstandings.

It's important to provide adequate context for large chunks of data within performance reports with explanatory text and visual aids. This must be done in a manner that allows people from all walks of life to participate. To make the summary more comprehensible, visuals like charts, tables, and graphs can be utilized to demonstrate the success measures.

It's crucial to keep in mind the most crucial measures that need to be monitored when composing performance reports. These criteria should be established at the outset of the endeavor and used to determine its success or failure. Cost, timeliness, quality, client happiness, and performance goals are all measures that ought to be included in performance reviews.

Any additional information that may be of interest to the stakeholders should be reported alongside the success measures. Updates on the project's status, resource utilization, recognized risks, and issues, and implemented alterations could all fall under this category.

Reliable and timely achievement feedback is a must. Reports should be distributed on a consistent schedule, such as every week or every month,
to give parties access to the most recent data. To ensure that all parties involved in a project have the knowledge necessary to make educated choices, regular performance monitoring is essential. To maintain the success of their projects, project managers must ensure that achievement reports are written in a methodical and standardized manner, include graphics to show the data, and contain correct and up-to-date information.

The success or failure of a project can be gauged by conducting a thorough performance assessment. Steps are taken to examine the project considering established standards, such as the "triple constraint" of cost, duration, and availability.

When assessing a project's success, the project setting is crucial. It helps the project management team and anyone else interested in the project keep tabs on its development. Data can be presented in an easily digestible format using various visualizations like maps and color labeling. Indicators can be color-coded, with red indicating an issue and green indicating progress.

Evaluating a project's success can reveal important details about the project's development and reveal any hidden dangers. By periodically reviewing progress, a project manager can spot potential trouble spots and take corrective measures before they derail the project. They might additionally be able to suggest ways in which the project could be enhanced to better achieve its goals.

Stakeholders can have their voices heard through performance reviews because of this. Project management becomes more collegial because of increased communication between the project lead and other parties. This ensures that everyone is on the exact same page regarding the project's status and may assist to keep things moving along smoothly. Evaluating the success of a project is a crucial part of any project management strategy. The project manager along with other partners can use periodic evaluations to figure out if the project is developing as planned and, if not, what changes should be made to get it back on track. The project manager is able to demonstrate the data in a straightforward and comprehensible manner by using visualizations such as maps and color labeling, ensuring that all parties are on the exact same page and the project's goals are met.

Approach towards Performance Evaluation

Project performance evaluation is the process of assessing and evaluating the progress of a project to ensure that it is meeting the project goals and objectives. This evaluation is conducted at regular intervals throughout the project and helps identify any issues that may arise and require immediate action to prevent delays or budget overruns. There are a variety of evaluation tools and methods that can be used such as earned value analysis, bench marking, variance analysis, and casual analysis. Project performance evaluation helps to ensure the project is on track and any potential issues can be identified and addressed quickly.

- Timelines of evaluation are the steps that need to be taken to ensure that the project is completed on time and up to the required standards.
- Pre-project evaluation is the initial step which is performed to check the feasibility of the project and decide if the project is worth undertaking.
- Post project evaluation is done after the project is complete to analyze the outcomes and assess if the project achieved its objectives and business goals.
- Constant evaluation is conducted after each stage of the project to monitor the budget, scope and schedule of the project.

External evaluation is done by a third party to provide a high level of objectivity in performing and finishing the review.

1. Evaluation is an important part of any program or project, and there are four main types of evaluations.

2. Process evaluation looks at whether the project has been implemented according to the plan and if the goals of the stakeholders are being met.

3. Impact evaluation looks at the immediate impact of the program and how successful it was in achieving its goals.

4. Outcome evaluation looks at the long-term consequences of the program and whether external factors affected the intended change.

5. Finally, summative evaluation considers the entire program cycle and evaluates whether the program should be continued or not.

Below is one of the templates which can be used for measuring the evaluation:

Objective	**Outcome**	**Questions asked**	**Document and source referred**	**Who evaluated**	**Evaluation date**

Feedback and benefits of Performance Evaluation

Giving project team members feedback on their performance is an important step to improving team productivity. The goal should be to evaluate how well each team member is doing compared to the established goals and objectives, and to provide constructive criticism and positive reinforcement. Not only does this help team members to identify areas where they can improve, it also helps to boost morale and encourages everyone to work together and strive for better results.

In project management, performance metrics are used to compare the actual outcomes of a project to the initial goals that were established. These metrics provide an accurate assessment of how the project is progressing and can help to identify any potential problems or changes that need to be made in order to ensure successful completion. This information can also be used to anticipate any unforeseen impacts of the project, such as finding an unexpected market for a product, and to make mid-course adjustments that will optimize success.

Evaluation Goal Matrix

The evaluation goal matrix is a powerful tool that helps to consolidate the goals and objectives of all stakeholders involved in a project. It provides an overview of the different measurements that need to be taken into account, such as efficiency, impact, and effectiveness, and the metrics and tools that should be used to measure them. This matrix helps to ensure that all goals are met, and outlines what is important to achieve them.

Below is the example of metric that can be used to track evaluations

Stakeholder	Goal	Measurement Type	Metric	Tool
Project Sponsor	On budget	Efficiency	The budget should not go above $12000	Earned value

Evaluation Tools

Evaluation tools are an essential part of any project or process. They provide a means of tracking progress and measuring success against set goals. Different tools are available, depending on what type of data needs to be collected and analyzed. Careful consideration needs to be taken when selecting the right tool for the job in order to make sure the data is being captured accurately and can be used to make informed decisions that positively influence the project.

Tools and their importance

Root Cause Analysis is a tool used to identify the underlying cause of a problem. It involves breaking down the problem into its component parts and tracing it back to its source. Earned Value Analysis is a tool used to track budget and schedule against a baseline. It helps to ensure that the project is meeting its goals. A Fishbone Diagram is a cause and effect diagram which allows project managers to identify potential problems within a project and brainstorm possible risks. Management by Walking Around is a technique that encourages managers to be more accessible and less formal, allowing people to discuss issues openly. Key Performance Indicators (KPIs) are used to capture data that is relevant to the goals of a project, allowing for closer tracking and more opportunities for improvement.

Cause-and-Effect diagram

A fishbone diagram is a tool used by project managers to identify and analyze the potential causes of a problem. It is shaped like a fish skeleton, with the problem at the head and the causes branching out from the spine. The diagram helps project managers to identify and visualize different aspects of the problem and to identify any patterns or commonalities that may be

underlying the issue. This way, project managers can look for solutions that address the root causes of the problem and can prevent future occurrences.

Perform Earned Value

Some of the best practices are listed when EVM is performed:

1. Ensure a clear procedure to identify the various stages of the project and have a detailed system description outlining the management processes.

2. Incorporate the use of Earned Value Management System (EVMS) into the company culture.

3. Implement EVMS as soon as the project can be sufficiently broken down into distinct tasks.

4. Make sure the Work Breakdown Structure (WBS) is product-oriented and only one higher-level WBS element summarizes a lower-level WBS element.

5. Utilize the same level of WBS for all planning and cost collecting, and make sure it is not artificially forced to a common level.

6. Ensure the WBS is detailed enough to properly describe the scope of work and allocate responsibilities.

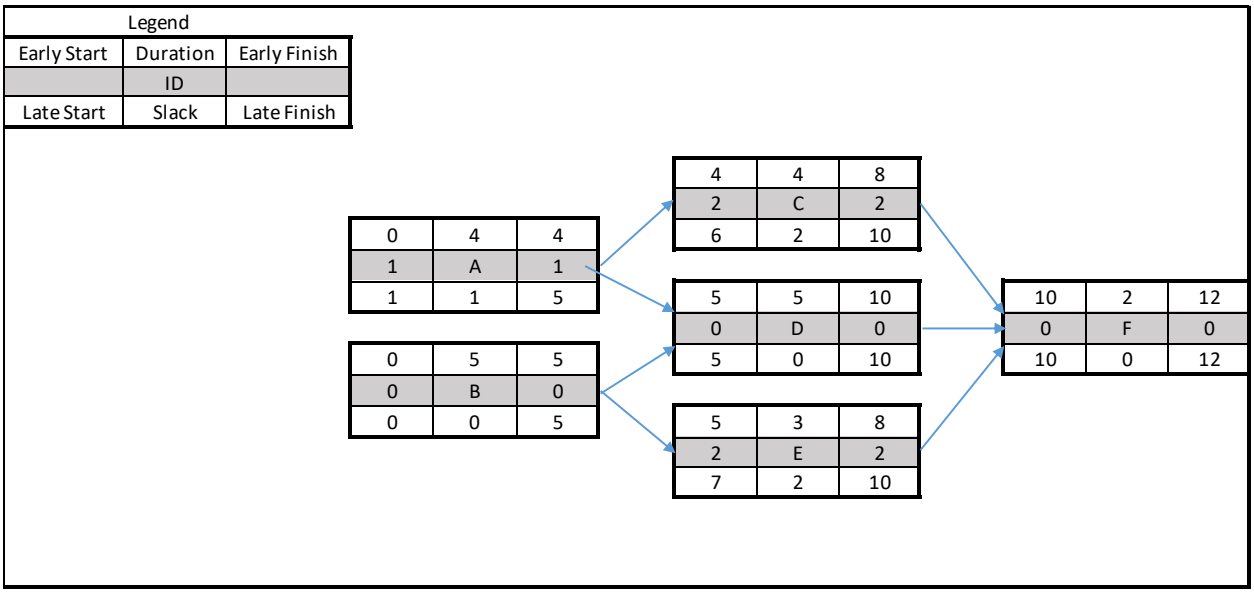
7. Employ full CPM scheduling depending on the scale, complexity, and risk of the project, and make sure all planning is time phased.

8. Determine the level of precision required for EV estimates based on the magnitude, complexity, and risk involved.

Refer to the below earned value example:

ID	Budget	0 1	2	3	4	5	6	7	8	9	10	11	12
A	40	10	10	10	10								
B	32	8	4	8	4	8							
C	48					12	12	12	12				
D	18						6	2	2	2	6		
E	28						8	8	12				
F	40											20	20
Total	206	18	14	18	14	20	26	22	26	2	6	20	20
Cumulative		18	32	50	64	84	110	132	158	160	166	186	206

Status Report: Ending Period 8						
Task	% Complete	EV	AC	PV	CV	SV
A	100%	40	35	40	5	0
B	100%	32	24	32	8	0
C	100%	48	32	48	16	0
D	33%	5.94	20	10	-14.06	-4.06
E	100%	28	20	28	8	0
Cumulative Totals		153.94	131	158	22.94	-4.06



The critical path is B-D-F

Based on the above data we calculate the SPI and CPI value at end of 8th reporting period. The value of SPI is 0.9 and CPI is 1.18 which is an indication that the project is under budget but is way behind schedule.

Incorporating Integrated Change Control

Integrating change management and project management is essential for a successful project. To ensure the changes are managed correctly, an effective change control system should be designed. This system should be as efficient as possible, while also considering the needs of those involved in the project. According to Prosci's research, there are five components that should be addressed to effectively combine change management and project management: communication, stakeholder engagement, change readiness, resistance management, and learning

and development. Communication should ensure that everyone is on the same page and understand the project objectives.

Stakeholder engagement should be considered to ensure that everyone is on board with the changes. Change readiness should be assessed to ensure that all stakeholders are prepared for the change. Resistance management should be used to address any issues that stakeholders may have with the changes. Finally, learning and development should be implemented to ensure that all stakeholders have the necessary skills to work with the changes.

1. People:
    a. Ensure that the stakeholders are accessible throughout the duration of the project and keep them informed and updated about the progress of the project.
    b. Assign distinct roles and responsibilities to each stakeholder and ensure that there are no conflicting interests that might affect the outcome of the project.
    c. Create a communication plan and document the involvement required from the stakeholders for any type of change requests.
2. Processes:
    a. When implementing change, it is important to use a process-driven and milestone-driven approach. This approach ensures that tasks are completed on time and that proper documentation is kept throughout the process. It also allows team members to see the progress of the change.

    b. For successful change implementation, it is essential that the team members who are directly impacted by the change are consulted and kept informed of the progress. Their input and support can be invaluable for the successful implementation of the change.
3. Tools:
    a. To track and manage change requests, the tools being used should be identified, and a responsible person should be chosen to update the tool. b. The reason for the change should be clear to the team, and the documents should be updated accordingly, making sure to keep track of the different versions.
4. Methodologies:
    a. When integrating project management and change management processes, it is important to keep the responsiveness of change management in mind.
    b. Failure to do so could lead to unforeseen consequences such as an inability to adapt to changes in the environment or to properly assess the impact of changes.
    c. It is important to ensure that the integrated technique allows for flexibility and the ability to adjust to the changing needs of the organization.
    d. It is also important to consider the potential risks of blending the two processes and determine how they can be mitigated.
5. Results and outcomes:
    a. Success after change has been completed would include the implementation of the desired change, the successful adaptation and utilization of the change by employees, and the achievement of the expected outcomes and results.

b. To measure the effectiveness of the change management process, the practitioner must determine the proportion of the project's overall outcomes and results that are dependent on employees accepting and utilizing the change.

Few best practices for integrating change control are as follows:
1. We should have a change management system in place which assesses requests for modifications to the project's plan, methods, budget, schedule, or deliverables.
2. A change request must be submitted which outlines the details and implications of the requested change.
3. The change must be agreed in writing by both the client and a representative from the project's senior management.
4. The Project Manager should always be aware of the proposed changes before they are finalized.
5. Once the change request has been approved, all documents affected by the change should be updated, such as the project charter, scope, and schedule.

To conclude the control system should be designed to be as efficient and cost-effective as possible, using the minimum amount of effort necessary to achieve the desired results. This means that the system should be designed to be as efficient as possible and should not require more effort or expense than is necessary in order to get the desired outcome.

Change Request Template

Below is the proposed change request template which should be used with:

Project Name		Change Number	
Requested By		Date of Request	
Presented To			

Change Name	

Description of Change:

Reason for Change:

Effect on Deliverables

Priority of Change (High – Medium - Low)

Effect on Schedule:

Effect on Project Cost:		
Description	Dollars	
	Increase	Reduction
Analysis		
Drawing Contracts (food truck rent not included)		
Obtaining license and permits		
Total Net Change in Cost:		

Effect of NOT Approving this Change:

Reason for Rejection (if applicable):

Project Sponsor

☐ **Approved** **Signature** _____

☐ **Rejected** **Title:** _____ **Date:** _____

Head Chef

☐ **Approved** **Signature** _____

☐ **Rejected** **Title:** _____ **Date:** _____

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