# Project evaluation in seven steps

## Exercise for an (interim) evaluation with the team, using the four dimensions of project success

Everyone considers evaluating important, yet it often happens only sparingly. In a background article we explain why and give tips. With this exercise we hope to give you practical inspiration to make your evaluation a constructive one.

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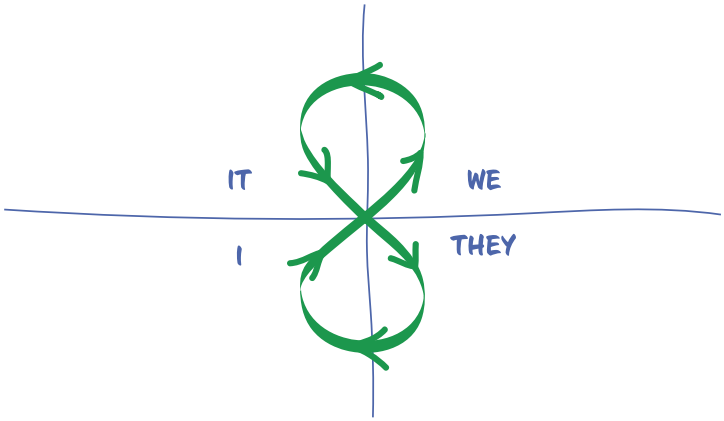
|---|---|
| PURPOSE | Learning together from the past phase and identifying the lessons and points for improvement for the coming phase or future projects. |
| WHEN | After a phase (interim) or at the end of the project. |
| WITH WHOM | The whole team. Ask a process facilitator, such as a PDC facilitator, to guide the meeting. As project manager you can then take an active part yourself; after all, you are part of the team too. |
| WHAT YOU NEED | Flip charts, green and red sticky notes, thick markers, round stickers and a handout with the chosen statements. |

### THE FOUR DIMENSIONS

We recommend using the four dimensions of project success according to PDC: the PDC lemniscate. This model forms the basis of the approach and ensures that you look at your project approach from several perspectives.




### HOW TO GO ABOUT IT

1. **Start with a good check-in.** Evaluating can feel quite vulnerable. Pay attention to this before you begin. Explain the purpose clearly: learning together from the previous phase and improving the approach for the next phase or the next project. Make agreements about the atmosphere, for example with the Team Spirit exercise.

2. **Explain the four dimensions of project success.** Before the participants get to work, explain the four quadrants of the model clearly:

   **THEY side – environment.** Do we have enough contact with the environment? Do we know the people involved and what their wishes are, and do we take enough account of sensitivities?

**I side – commitment.** Does everyone come into their own, and is everyone willing and able to take responsibility for the project? How about your own contribution? To what extent do you feel jointly responsible?

**WE side – collaboration.** How is our teamwork going? Do we know where to find each other? How do we resolve issues among ourselves?

**IT side – structure.** Do we have enough overview and structure? Are the division of tasks and the planning in order? How do we record agreements?

3. **Choose your focus.** Many people look for the right questions per dimension of the lemniscate. That is why the appendix contains a list of statements to use and work into the exercise. The book Project Driven Creation, chapter on evaluating, contains even more. Hand out the chosen statements or questions per dimension. Ask all participants to write on green sticky notes what they appreciate about how the project has gone so far, and on red ones where they would like to see improvement.

   **Tip:** you also learn from what went well and what people would like to keep. Participants tend to skip over this too quickly. Encourage them to write that down as well.

4. **Collect the input.** Use one flip chart sheet per dimension for the participants' input.

   **Tip:** avoid discussion. Let everyone explain his or her sticky notes and only ask the other team members whether it is clear.

5. **Prioritise and choose.** Let the team choose the points that are most important for formulating lessons and/or improvements. For example, give everyone a few round stickers to place on the sticky notes of their choice.

6. **Formulate lessons and improvements.** Have participants make proposals in pairs or small groups. Have them write these down concisely and legibly on flip charts or large sticky notes.

7. **Discuss the proposals.** Have each group explain its proposals and check with the team where additions are needed. Make sure the proposals are concrete and end up where they will be used in practice. Otherwise they all too often disappear into a folder, never to be found again. Where possible, take a decision on the proposals.

   **Tip for the follow-up:** make sure the lessons also land outside the team. For example, discuss them in the sponsors' meeting, have project managers regularly tell each other about successes and failures in their projects, and store evaluations so that others can easily find them. It helps if management puts following up on recommendations on the agenda.

## TIPS

- **Make it safe.** Evaluating can be nerve-racking. Choose an approach in which everyone can say what needs to be said, with respect for each other and out of commitment to the success of the project. Choose dialogue rather than discussion: a discussion aims to convince the other person and gets in the way of open inquiry.
- **Pay attention to successes as well as points for improvement.** What went well does not repeat itself automatically. Name the successes and turn them into concrete tips that others can benefit from. This also contributes to safety.
- **Also evaluate along the way,** for example at a phase transition or when delivering subdeliverables. By the end of the project people have forgotten a lot, and the project itself no longer benefits from the outcomes.
- **Give every finding an owner.** Who is a tip or finding meant for: the project manager, the team, the sponsor, the end users? The more sharply you name this, the more effective it is.

Good luck!

## NOTES

## APPENDIX: STATEMENTS PER GROUP OF SUCCESS FACTORS

You can use these statements for the evaluation and work them into the exercise. For each dimension, choose the statements that suit your project.

### THEY – ENVIRONMENT

| THEME | STATEMENT |
|---|---|
| **Agreement** | There was agreement between the sponsor and the project manager on the project contract. |
| **Clients/users** | The satisfaction of clients/users with the project results as they were realised was the guiding principle. That is why they have been closely involved from the start of the project. |
| **Sponsorship** | The sponsor / the sponsoring system was/were passionate about 'their' project, able in their role, authorised to take decisions and available to the project manager where needed. |
| **Value** | In advance, we made explicit and weighed the added value of the results and effects of the project (for example with a business case or cost-benefit analysis). |
| **Prioritisation** | There was clear prioritisation between the project and its sub-projects, and in relation to other work. This came about through a transparent process in which we applied unambiguous criteria. |
| **Embedding** | The project objectives are explicitly linked to strategic organisational objectives. Everyone involved was aware of the relationship between the two. |
| **Line organisation** | The line managers involved who supplied capacity for the project were sufficiently informed and behaved as full contract partners. |
| **Arena** | Line managers settle their differences of interest among themselves. Project team members do not have to fight for the interests of their own manager in the project team. |

### I – COMMITMENT

| THEME | STATEMENT |
|---|---|
| **Choice** | The project manager and team members had the opportunity to choose for themselves the kind of work they contribute to. They were encouraged and challenged to do so. |
| **Creativity** | Project managers and team members were given plenty of room to shape for themselves the way the project is approached. |
| **Expertise** | There was attention and room for developing the project manager, support staff and project team members in the field of project management. |
| **Commitment** | We took the commitment of everyone directly involved in the project seriously and regularly asked each other about it. |
| **Reciprocity** | There was attention and room for the team members' own professional and personal development. |
| **Escalating** | The project manager and other leads did not muddle on when problems arose, but asked for help in time and escalated when needed. |
| **Project manager** | The project manager knows his or her own qualities and limitations. The project manager is strong, commands respect from sponsors, line managers and team members, and actively maintains equal relationships with them. |

## WE – COLLABORATION

| THEME | STATEMENT |
|---|---|
| **Team composition** | When putting together the project team(s), we paid attention not only to skills and knowledge, but also to the personal match between the project and the employee. |
| **Working together** | Project team members worked together intensively to shape the project. For this they used Project Startups (PSUs) and other joint working sessions. |
| **Agreements** | In project teams we made agreements about how we treat each other and about the collaboration we wanted. |
| **Team development** | We made our collaboration open to discussion. We respected each other's differences and qualities and worked together harmoniously. Where necessary and appropriate, we made use of tools such as Insights, Belbin, MBTI or Management Drives. |
| **Ground rules** | We explicitly described the roles, tasks, responsibilities and authorities in the project organisation. The same goes for unambiguous ground rules for the collaboration between sponsor, contractor, team member, capacity supplier, steering committee, and so on. Everyone also kept to them. |
| **Force field** | Project teams regularly analyse the force field around their project and actively intervene in it. |
| **Learning** | We evaluated the project on aspects defined in advance, both during and after the project. We consciously used the results of these evaluations to improve future performance. |

## IT – STRUCTURE

| THEME | STATEMENT |
|---|---|
| **Methodology** | We use a specific project management method that suits the project and our organisation. |
| **Consistent use** | We used the same language, the same conceptual framework and the same instruments from the project management method. |
| **Contract** | The project had an up-to-date project contract. It contained an unambiguous and clear project definition or business case, an activity plan, a control section covering time, money, quality, organisation, information and communication, and a plan for managing risks. |
| **Time** | We had a clear schedule, which was always up to date. As a result, the project was delivered around the agreed deadline. |
| **Money** | The project had an adequate budget, and spending against it was tracked. The organisation was therefore 'in control' on this aspect. As a result, the project was delivered within budget. |
| **Quality** | For each result or subdeliverable we set quality standards in advance, together with a method for testing against them. Before delivery, we tested the results and subdeliverables against the standards and approved them. |
| **Reporting** | We reported systematically, effectively and unambiguously on the progress of the projects. To this end, we agreed in advance on the frequency and form of the reports. |
| **Capacity** | Before the project, we estimated the input required from staff and made sure they could actually spend this time on the project. |

