No Need to Reinvent the Wheel: Project Management Tools for your Evaluation Projects

Hello! We're Michelle Landry and Judy Savageau from the University of Massachusetts Medical School's Center for Health Policy and Research.

As Sean Allen Levin suggested in the AEA blog on January 30th, organizing an evaluation project or multiple projects can be daunting. The details of timelines, responsibilities, and deliverables can easily be lost if they are only in the project manager's head. As with any project, maintaining a quality and structured work environment benefits the entire team and clients. To expand on Sean's blog, we'd like to share lessons learned during our recent review of project management tools and how it's brought to light not only the vast sea of options, but also what our needs/wants are from the tool.

Hot Tip (Lesson #1): Work backwards to determine your specific needs. What outputs are most useful? What information is needed to report regularly? How large is the project or how many projects need to be captured in the database?

Hot Tip (Lesson #2): Determine if you have a budget or spending limit to support a new tool. There *are* affordable options that aren't readily obvious. However, if have the budget, there are options to satisfy your every whim.

For no/low cost options, look to Microsoft Office. This is affordable because most users already have the software; e.g., MS Excel, MS Access, and MS Project which have onsite relational databases with ranges in user friendliness/abilities. A number of software vendors sell robust project management tools, but they come with a price tag. We reviewed tools used by our university colleagues; e.g., Quickbase (now piloting) and Journyx. Many others are available with websites offering comparisons among the applications.

Hot Tip (Lesson #3): Review your needs against the software's options. Many websites allow testing project management tools through a virtual tour. Take advantage of this; it's best to see how user-friendly the software is before purchasing.

Hop Tip (Lesson #4): Each application has budgetary implications, so if, of necessity, you're budget conscious, check into the vender's software offerings. Is it a one-time cost or license needing annual renewal? Does it require a monthly user fee?

Hot Tip (Lesson #5): Customize, customize, customize… Most software packages are customizable. Do not take it "out of the box" and assume that's all you get. Many venders offer customization options to meet your needs. Customizing can take a few rounds as test driving one change often uncover additional changes. Customizing the software may reduce frustration and better meet your needs. See if there's someone "in-house" who can customize your software before paying the vendor – a great budget saver!