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| Waterloo Information Systems and Technology |
| Health Check |
| [Insert Project/Program Name] |

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***Purpose of Health Check***

*The purpose of the project/program health check is to gain an independent assessment of how well the project or program is performing in accordance with its objectives and how well it adheres to the methodology’s best practices. A health check will be executed during various life cycle stages of a large and medium sized project as a risk mitigation tool, and should be included in the project/program management plan and schedule. Health checks can also be requested for any project at any time.*

*An effective health check will provide access to immediate findings that can be used by the Project/Program Manager and Sponsor during execution of the project/program. It provides opportunities to expand on what is going well, and make improvements where necessary, increasing the likelihood of success due to earlier detection of issues and optimization opportunities.*

***Health Check Participants and Approvers***

*Execution of a project/program health check should be done by a third party, the PMO, who is not the Project/Program Manager. The PMO will collect input from the Project Manager, sponsor, stakeholders, and project/program team through a series of interviews. The PMO’s role in conducting health checks is strictly advisory, based upon experience and best practices.*

*Acknowledgement of completion and accuracy will be signed within the health check by the Executor within the PMO, the Sponsor, and the Project Manager. This acknowledgement does not indicate the project/program’s acceptance that any or all recommendations will be implemented. The decision of what actions to take and how are the decision of the project/program and will not be documented or tracked through the PMO’s health check process.*

***Instructions***

1. *Research and understand project/program information by reading any prior documentation (such as intake form, business case, charter, management plan, risk register, schedule, issues log, etc) and speaking to Project/Program Manager, Sponsor, team, and other stakeholders.*
2. *Ask questions included in the health check and record answers appropriately, depending on current state of project/program. The specifics of who said what are to be kept strictly confidential. Write the final health check report.*
3. *Review health check with applicable stakeholders for accuracy and completeness.*
4. *Scan the signed health check and upload to the Project/Program Knowledge Base.*

***Next Steps***

*Share the results with the Project/Program Manager, Sponsor, Team and stakeholders. The Project/Program Manager, Sponsor, and governance bodies will decide what to do with the opportunities presented in the health check and choose how and when to implement those action items.*

Table of Contents

[Project/Program Description 3](#_Toc424566439)

[Health Check Process 3](#_Toc424566440)

[Summary of Results 3](#_Toc424566441)

[Health Check Details 3](#_Toc424566442)

[Project Strengths 3](#_Toc424566443)

[Opportunities for Improvement 3](#_Toc424566444)

[Revision History 4](#_Toc424566445)

# Project/Program Description

*Provide a brief description (a few paragraphs) of the project/program. The charter is typically an excellent source for this description.*

[Insert Description here]

# Health Check Process

*Provide an overview of the process followed for this specific health check. This overview should include details on who was interviewed, how information was gathered, what documents were provided and reviewed, and the intended audience of the health check results. If the health check was requested outside of the typical medium/large size project checklist, the reasons as to why the health check was requested should also be included. If there is missing information that could not be included, or missing stakeholder viewpoints, then this should also be clearly stated in this section.*

[Insert Process here]

# Summary of Results

*This section is meant to be an executive summary of the health check results. It should summarize the key, high priority observations and recommendations. If there are specifics from the process that should be pointed out, then include these in the summary as well (e.g. key stakeholder groups who may have not provided information towards the health check).*

[Insert Summary of Results here]

# Health Check Details

## Project/Program Strengths

*Health checks should include project strengths, as well as opportunities for improvement. This section should comment on project/program strengths, including why it is a strength and any recommendations on how the project/program may take further advantage of these strengths.*

[Insert Strengths here]

## Opportunities for Improvement

*List the key observations that present opportunities for improvement. These observations must be supported by possible impacts that could occur within the project/program. Some of these possible impacts may already be occurring within the project. A recommendation for the observations should also be provided. The recommendation should be based on project/program management best practices and experience. Any observations outside of the scope of project/program management should not be included in the health check. Individual interview and questionnaire responses must be kept confidential so specific names should not be documented in this report. The intent of these observations are to provide opportunities for improvement to avoid possible negative impacts to the project, not to finger point or lay blame.*

| Observations | Possible Impacts | Recommendation |
| --- | --- | --- |
| [observation 1] | [possible impacts for observation 1] | [Recommendations for observation 1] |
| [observation 2] | [possible impacts for observation 2] | [recommendations for observation 2] |
| [observation 3]  | [possible impacts for observation 3] | [recommendations for observation 3] |
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# Revision History

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| --- | --- | --- | --- | --- |
| Change Made By | Date Change Made | Details of Change | Change Reviewed/ Approved by | Date change reviewed/ approved |
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