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. An effective health check will provide access to immediate findings that can be used by the Project/Program Manager and Sponsor during planning and 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.

## Section 1: Project and Contact Information

|  |  |  |  |
| --- | --- | --- | --- |
| Project Sponsor |  | Interviewee Name |  |
| **Project Manager** |  | **Interview Date** | dd-mon-yyyy |
| **Project Timeline** | dd-mon-yyyy to dd-mon-yyyy | **Interviewer Name** |  |
| [**Project Phase**](https://uwaterloo.ca/it-portfolio-management/methodologies/project-management/project-success) **(bold or highlight project phase at the time of this questionnaire)** | Initiation / Planning / Execution / Closure |  |  |

## Section 2: Instructions

For each question, assign a score ranging from 1 to 5:

1 = Strongly Disagree

2 = Disagree

3 = Agree and Disagree

4 = Agree

5 = Strongly Agree

If an answer is unknown, please leave the answer blank and provide an explanation in the comments section.

Individual responses will remain confidential.

## Section 3: Questionnaire

|  | **Score** | | **N/A** | |
| --- | --- | --- | --- | --- |
| **Scope** |  | |  | |
| 1. Is the project staying within the documented scope? |  | |  | |
| 1. Was the project properly [sized](https://uwaterloo.ca/it-portfolio-management/methodologies/project-sizing-and-complexity) according to resources and risk? |  | |  | |
| 1. Are changes to scope being appropriately discussed, approved and documented? |  | |  | |
| 1. Is scope being managed appropriately against other project constraints (budget, time)? |  | |  | |
| 1. Are the success criteria still relevant as the project evolves? |  | |  | |
| Comments: | | | | |
| **Stakeholders** |  | |  | |
| 1. Do stakeholders still perceive benefit(s) from anticipated end deliverable(s), based on current scope? |  | |  | |
| 1. Does the project team and project manager have adequate commitment and support for the project? |  | |  | |
| 1. Are stakeholders being appropriately monitored and engaged? |  | |  | |
| 1. Are stakeholder expectations appropriately managed? |  | |  | |
| Comments: | | | | |
| **Change Management** |  | |  | |
| 1. Is the change management plan being executed consistently, with appropriate approvals and communications? |  | |  | |
| 1. Have all scope, budget, and time variations been subject to the change management process? |  | |  | |
| 1. Has the project management plan been adjusted to account for variations in approved changes? |  | |  | |
| 1. If there is organizational change, is the plan for introducing this change being executed, monitored, and modified as appropriate? |  | |  | |
| Comments: | | | | |
| **Cost** |  | |  | |
| 1. Is adequate funding available for the duration of the project? |  | |  | |
| 1. Are costs and budget being appropriately monitored and forecasted? |  | |  | |
| 1. With what you know today, are you confident the budget and contingency will cover upcoming expenses? |  | |  | |
| Comments: | | | | |
| **Time** |  | |  | |
| 1. Is a suitably detailed, up-to-date schedule in place? |  | |  | |
| * 1. Is the schedule being followed by the project team? |  | |  | |
| 1. Are milestones being used to manage and communicate progress? |  | |  | |
| 1. Is there a solid and realistic plan for the remaining work, allowing for the realization of the defined benefits/success criteria/objectives? |  | |  | |
| 1. If the remaining duration is at least 6 months, is there another health check scheduled? |  | |  | |
| 1. With what you know today, are you comfortable that remaining contingencies can account for unexpected tasks/time commitments? |  | |  | |
| Comments: | | | | |
| **Resources** |  | |  | |
| 1. Are the right resources available to the project? |  | |  | |
| 1. Are the resources able to allocate sufficient time to the project? |  | |  | |
| 1. Are the resources being provided with the necessary training and tools to complete the project work according to their roles and responsibilities? |  | |  | |
| 1. Is the morale on the project team good? |  | |  | |
| 1. Is the project team working together towards a common goal? |  | |  | |
| 1. Are you confident that work can be completed without concerns of burn out or overwork for the remaining tasks? |  | |  | |
| 1. Do the resources have a clear understanding of the project success criteria, goals/objectives, and current scope? |  | |  | |
| 1. Do the resources have a clear understanding of their assigned tasks, and due dates/milestones? |  | |  | |
| Comments: | | | | |
| **Communication** |  | |  | |
| 1. Is the communications plan being implemented, monitored, maintained, and changed appropriately? |  | |  | |
| 1. Are regular status reports being created and shared with project team members, stakeholders, sponsor, and governance bodies? |  | |  | |
| Comments: | | | | |
| **Risks and Issues** |  | |  | |
| 1. Are regular risk reviews undertaken, as identified in the risk management plan, resulting in appropriate risk updates? |  | |  | |
| 1. Are realized risks being transferred and tracked through the issues log? |  | |  | |
| 1. Are issues managed, assigned, and recorded through to resolution? |  | |  | |
| 1. Are issues and risks being escalated according to management plans? |  | |  | |
| 1. Are you confident that there should be no unexpected “show stoppers” at this point in time for remaining scope (features and requirements)? |  | |  | |
| Comments: | | | | |
| **Contingency Planning** |  | |  | |
| 1. Is there an approved contingency plan in place if the project fails to meet the constraints (scope, schedule, or budget)? |  | |  | |
| * 1. Are the impacts of the contingency plan understood by project governance? |  | |  | |
| Comments: | | | | |
| **Benefits** |  | |  | |
| 1. Are the project objectives and benefits still relevant against the current scope? |  | |  | |
| 1. Is the project still aligned with the objectives and strategies of the University and the department(s) impacted by the deliverable(s)? |  | |  | |
| Comments: | | | | |
| **Processes** |  | |  | |
| 1. If the project is expected to have an impact on business (IST and IST clients) processes, is this impact being appropriately managed? |  | |  | |
| 1. If impacts are likely to occur outside the University are those impacts being appropriately managed? |  | |  | |
| Comments: | | | | |
| **Training** |  | |  | |
| 1. Is roll out training accounted for in the schedule and budget? |  | |  | |
| 1. Have resources been acquired to deliver the training, if required? |  | |  | |
| Comments: | | | | |
| **Implementation** |  | |  | |
| 1. If there is an implementation plan in place for the cutover, is it still valid? |  | |  | |
| * 1. Are the defined criteria for ‘go live’ still valid and taken into account? |  | |  | |
| 1. Is it determined who will authorize ‘go live’? |  | |  | |
| Comments: | | | | |
| **Governance** |  | |  | |
| 1. Is governance reviewing appropriate checkpoints/milestones throughout execution? |  | |  | |
| 1. Is there still sufficient executive support for the project? |  | |  | |
| 1. Is the project sponsor still fully committed to the project’s success? |  | |  | |
| 1. Is the project sponsor staying involved in the project at an appropriate level to be accountable for project success? |  | |  | |
| 1. Is governance providing the correct level of support and removing the roadblocks in a timely manner? |  | |  | |
| 1. Is the project management [methodology](https://uwaterloo.ca/it-portfolio-management/methodologies/project-management/project-success) being adhered to? |  | |  | |
| Comments: | | | | |
| **Roles and Responsibilities** |  | |  | |
| 1. Do the roles and responsibilities provide an accurate reflection of what is really happening? |  | |  | |
| 1. Has the Project Manager been provided with the appropriate information and authority within the project to manage the project and be responsible for the success of the project? |  | |  | |
| 1. With what you know today, are you confident in being able to execute this project successfully? |  | |  | |
| Comments: | | | | |
| **Documentation** |  | |  | |
| 1. Is there sufficient documentation reflecting the [size and complexity](https://uwaterloo.ca/it-portfolio-management/methodologies/project-sizing-and-complexity) of the project? |  | |  | |
| 1. Are the major documents generally well-constructed and up-to-date? |  | |  | |
| 1. Is the documentation for the project stored in a central location with appropriate accessibility? |  | |  | |
| Comments: | | | | |
| **Requirements and Testing** |  | |  | |
| 1. Are requirements documented to the extent required? |  | |  | |
| 1. Do the deliverables reflect the scope and requirements documents? |  | |  | |
| 1. Is there a tracking system for requirements and changes to requirements? | |  | |  |
| 1. Are reasons for changes to requirements documented along with who approved the change? | |  | |  |
| 1. Are requirements traceable to project scope, objectives, benefit(s), and success criteria? | |  | |  |
| 1. Are acceptance criteria for the deliverables defined and documented? | |  | |  |
| 1. Can the testing be mapped to the requirements? | |  | |  |
| 1. Is testing documented with expected results, actual results, and appropriate sign offs? | |  | |  |
| 1. Where re-tests for defects are required, are they appropriately signed off and traceable to the original failed tests and requirements? | |  | |  |
| Comments: | | | | |
| **Procurement** | |  | |  |
| 1. If external vendors are being used, are up-to-date contracts in place? | |  | |  |
| * 1. Are sign offs for vendor deliverables obtained and recorded against the contracts/statements of work? | |  | |  |
| 1. Is the project manager actively managing vendor relations with respect to the project constraints and contracted deliverables? | |  | |  |
| 1. Is the vendor meeting targets for scope, schedule and cost? | |  | |  |
| Comments: | | | | |
| **Quality** | |  | |  |
| 1. Does the project have measurements on what is acceptable quality? | |  | |  |
| 1. Are quality reviews being undertaken and recorded? | |  | |  |
| Comments: | | | | |