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. Does a complete and signed charter exist for this project? |  |  |
| 1. Was what is in scope and out of scope well defined so that it is clear what the final deliverable(s) are? |  |  |
| 1. Were key stakeholders communicated with during scope definition? |  |  |
| 1. Are there documented success criteria for the project that clearly outlines success and aligns with objectives, scope, stakeholder expectations, and benefits? |  |  |
| 1. Is there a documented scope management plan clearly defining how scope will be managed, monitored, approved, and changed? |  |  |
| 1. Are project constraints (time, budget, and resources) and flexibilities clearly documented and understood? |  |  |
| Comments: | | |
| **Change Management** |  |  |
| 1. Is there a documented, well understood change management plan clearly defining what changes go through the change management process, who brings change requests forward, how change requests are documented, who is involved in decision making, and who approves changes? |  |  |
| Comments: | | |
| **Cost** |  |  |
| 1. Has the budget been approved and provided for the project? |  |  |
| 1. Are all anticipated costs accounted for in the budget? |  |  |
| 1. Is there a documented cost management plan clearly defining how costs and budget will be managed, monitored, maintained, approved, and changed? |  |  |
| 1. Have appropriate contingencies been accounted for within the budget? |  |  |
| Comments: | | |
| **Time** |  |  |
| 1. Has a suitably detailed schedule been created? |  |  |
| * 1. Does the schedule reflect the scope and constraints? |  |  |
| * 1. Does the schedule reflect dependencies? |  |  |
| * 1. Have appropriate time contingencies been accounted for within the schedule? |  |  |
| * 1. Is a project execution health check included in the schedule? |  |  |
| 1. Have regular milestones and/or critical path been identified and maintained to track progress? |  |  |
| 1. Is there a documented schedule management plan clearly defining how schedule will be managed, maintained, communicated, tracked, approved, and changed? |  |  |
| Comments: | | |
| **Quality** |  |  |
| 1. Is there a documented quality management plan clearly defining how quality will be managed, measured, tracked, approved, and changed? Does it ensure stakeholder and SME expectations and experience are reflected? |  |  |
| 1. Does the schedule include tasks for quality measures/reviews? |  |  |
| 1. Does the schedule have time allocated for rework after quality review(s), if required? |  |  |
| Comments: | | |
| **Resources** |  |  |
| 1. Are there sufficient and the right resources available to the project? Can they adequately account for voice and expectations of stakeholders? |  |  |
| 1. Does the project team have the necessary tools, skills and processes to undertake the project successfully? |  |  |
| 1. Has appropriate resource training to complete project work been planned and budgeted for? |  |  |
| 1. Do the resources have support and commitment from their managers for the time they will be dedicating to the project? |  |  |
| Comments: | | |
| **Communication** |  |  |
| 1. Is there a documented communications plan clearly defining how communications will be managed, tracked, monitored, approved, and delivered? Is somebody clearly identified as accountable for communications? |  |  |
| 1. Have all key stakeholders been identified? |  |  |
| 1. Is there a documented stakeholder management plan clearly defining how stakeholders will be monitored and managed? |  |  |
| 1. Has stakeholder consultation occurred? |  |  |
| 1. Are the key stakeholders committed and supported? |  |  |
| 1. If the project is delivering organizational change, is there an organizational change plan to appropriately introduce the change and manage expectations? |  |  |
| 1. Is status being communicated to governance, project team, sponsor, and other stakeholders? |  |  |
| Comments: | | |
| **Procurement** |  |  |
| 1. If external resources are being used, are up-to-date contracts in place to manage those resources through to the end of the project? |  |  |
| * 1. Is there a contingency to retain those resources beyond the scheduled end of the project, if required? |  |  |
| * 1. Is the expected work and deliverables clearly documented within the contract or statement of work? |  |  |
| 1. Does the project involves procurement, is there a documented procurement plan clearly defining how procurement and contracts will be managed, negotiated, approved, monitored, paid, signed, and changed? |  |  |
| * 1. Are the authorities and timeframes for procurement and contract negotiation understood and built into the schedule? |  |  |
| Comments: | | |
| **Risks and Issues** |  |  |
| 1. Are risks documented with impact, probability, grade, mitigation, and owner? |  |  |
| 1. Have key stakeholders been involved in identifying risks and mitigations? |  |  |
| 1. Is there a documented risk management plan clearly defining how risks will be managed, monitored, mitigated, escalated, and changed? |  |  |
| 1. Is there a documented process for recording, tracking, and reporting on issues? |  |  |
| 1. Is there a documented issue escalation process in place? |  |  |
| 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 a contingency plan understood by project governance? |  |  |
| Comments: | | |
| **Benefits** |  |  |
| 1. Are there clearly defined and understood objectives and/or benefits for the project? |  |  |
| 1. Is the project aligned with the objectives and/or strategy of the University and the department(s) receiving the end deliverable(s)? |  |  |
| Comments: | | |
| **Business Process** |  |  |
| 1. If there will be an impact to business processes (within IST or with IST clients), has the impact been communicated to the business and is it being planned for by the business? |  |  |
| 1. If impacts are likely to occur outside the University, are they being planned for? |  |  |
| Comments: | | |
| **Training** |  |  |
| 1. Is there a training plan in place that has been incorporated into the schedule? |  |  |
| 1. Have trainers been identified? |  |  |
| Comments: | | |
| **Implementation** |  |  |
| 1. Is there an implementation/cutover/transition plan in place? |  |  |
| 1. Is it determined who will authorize ‘go live’? |  |  |
| 1. Are there defined criteria for ‘go live’? |  |  |
| Comments: | | |
| **Governance** |  |  |
| 1. Has project governance been established and documented? |  |  |
| * 1. Do the project governance bodies have defined terms of reference and/or roles and responsibilities? |  |  |
| 1. Are there checkpoints/milestones for review by project governance? |  |  |
| 1. Has the project followed portfolio processes (e.g. project intake)? |  |  |
| 1. Is there executive support for the project? |  |  |
| * 1. Has executive support been fully communicated through the ranks? |  |  |
| 1. Is the project sponsor fully committed to the project’s success? |  |  |
| 1. Does the project sponsor fully understand his/her role on the project and that he/she is accountable for the success of the project? |  |  |
| 1. Is the project methodology being adhered to? |  |  |
| Comments: | | |
| **Roles and Responsibilities** |  |  |
| 1. Are roles and responsibilities clearly documented? |  |  |
| 1. Are all roles and responsibilities clearly understood and supported? |  |  |
| 1. Has the Project Manager been granted appropriate authority within the project to be responsible for the success of the project? |  |  |
| Comments: | | |
| **Documentation** |  |  |
| 1. Are documents stored in a central project location? |  |  |
| 1. Is the location well organized to enable documents to be easily located? |  |  |
| 1. Is there sufficient documentation according to project [size and complexity](https://uwaterloo.ca/it-portfolio-management/methodologies/project-sizing-and-complexity)? |  |  |
| 1. Are you confident in being able to execute this project successfully? |  |  |
| Comments: | | |
| **Requirements and Testing** |  |  |
| 1. Has a process been documented for gathering, recording, maintaining, approving, and changing requirements? |  |  |
| 1. Has a process been documented for development and testing? |  |  |
| 1. Are there documented test plans/scripts? |  |  |
| * 1. Can the test plan(s)/script(s) be mapped to requirements? |  |  |
| * 1. Do the test plan(s)/script(s) include expected results, and a place to record actual results? |  |  |
| Comments: | | |