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/Product Owner** |  | **Interview Date** | dd-mon-yyyy |
| **Project Manager** |  | **Interviewer Name** |  |
| **Project Timeline** | dd-mon-yyyy to dd-mon-yyyy | [**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 (release) / 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

Questionnaire Score (total of scores/possible score for applicable questions answered): NNN/NNN

|  | **Score** | | **N/A** | |
| --- | --- | --- | --- | --- |
| **Scope** |  | |  | |
| 1. Has a work breakdown been done to define the work needed to achieve the scope and objectives of the project? |  | |  | |
| * 1. Does the documented scope reflect this work appropriately? |  | |  | |
| 1. Are all understood features and requirements (user stories) documented in appropriate backlogs or similar documents to encompass the scope of the project? |  | |  | |
| * 1. Are the rules for prioritizing understood by team members? Are all items in the backlogs prioritized according to these rules consistently? |  | |  | |
| * 1. Are items in the project backlogs estimated? |  | |  | |
| * 1. Are the deliverables staying within these documented features and user stories? |  | |  | |
| * 1. Are items in defect/issues/bug backlog (or similar documents) grouped together and prioritized appropriately to be added to planned work? |  | |  | |
| * 1. Is backlog information (features, priorities, user stories, etc) updated as more information becomes available on the project? |  | |  | |
| 1. Does the project have a clear definition of what success looks like and what is required for the project to be considered done? |  | |  | |
| 1. Was the project properly [sized](https://uwaterloo.ca/it-portfolio-management/methodologies/project-sizing-and-complexity) according to resources and risk? |  | |  | |
| 1. Is scope being managed appropriately against other project constraints (budget, time)? |  | |  | |
| Comments: | | | | |
| **Stakeholders** |  | |  | |
| 1. Do stakeholders still perceive benefit(s)/value from anticipated end deliverable(s), based on current scope (features and user stories)? |  | |  | |
| 1. Does the project team and project manager have adequate commitment and support for the project? |  | |  | |
| 1. Are stakeholders being appropriately engaged according to interest and impact, and expectations monitored? |  | |  | |
| * 1. During regular stand ups? |  | |  | |
| * 1. During creation of initial release plan? |  | |  | |
| * 1. During planning for each iteration? |  | |  | |
| * 1. During demos? |  | |  | |
| 1. Is the client representative (product owner) adequately involved in the project (actively prioritizing backlog items, soliciting appropriate feedback, approving deliverables, identifying minimal viable product criteria, etc)? |  | |  | |
| Comments: | | | | |
| **Change Management** |  | |  | |
| 1. Is there a process being followed at an appropriate level for managing change to benefits, goals/objectives, release plan timeline, scope, et cetera, with appropriate approvals and communication? Describe the process. |  | |  | |
| 1. Are regular retrospectives at the end of each iteration conducted and documented? |  | |  | |
| * 1. Are the results of each retrospective incorporated into project execution for continuous improvement? |  | |  | |
| * 1. Are the appropriate stakeholders participating in retrospectives to incorporate all feedback? |  | |  | |
| * 1. Are the results of the retrospectives being shared with the rest of the organization as lessons learned? |  | |  | |
| 1. Is the release plan kept up to date, based on changes made to the project and the results of each iteration? |  | |  | |
| 1. If there is organizational change, is the plan for introducing this change being executed, monitored, and modified as appropriate? |  | |  | |
| 1. Is velocity being calculated? |  | |  | |
| * 1. Are appropriate adjustments being made based on velocity? |  | |  | |
| Comments: | | | | |
| **Cost** |  | |  | |
| 1. Is adequate funding available for the duration of the project? |  | |  | |
| 1. Are costs and budget being appropriately monitored? |  | |  | |
| 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 project release plan in place? |  | |  | |
| * 1. Have all known Must Have’s been accounted for in the release plan before execution begins? (ie: have all known Must Have’s been included in project scope, estimated before execution, and added to the release plan so stakeholders know when to expect them)? |  | |  | |
| 1. Is each iteration appropriately planned, documented and communicated with a breakdown of tasks to accomplish that iteration’s scope? |  | |  | |
| * 1. Are estimates reasonably accurate so that the committed work is getting done within an iteration? |  | |  | |
| * 1. Are iteration plans realistic and is the team adjusting their commitments based on their learnings? |  | |  | |
| 1. Does the team have daily stand ups? |  | |  | |
| * 1. Does the daily stand up account for dealing with issues that arose during yesterday’s execution |  | |  | |
| * 1. Does the daily stand up account for what the team will be working on that day? |  | |  | |
| * 1. Does the daily stand up include any obstacles that may come up (risks)? |  | |  | |
| * + 1. If future obstacles (risks) are identified during the daily stand up, are they being dealt with appropriately? |  | |  | |
| * + 1. Is there an role identified as the person accountable for following through with these obstacles? |  | |  | |
| * 1. Are these meetings efficient and useful and are they triggering follow up conversations and collaboration? |  | |  | |
| 1. Is a release plans and/or milestone plan for the entire project being kept up to date and shared with appropriate stakeholders to manage and communicate project progress? |  | |  | |
| 1. Is there a solid and realistic plan for the remaining work, allowing for the realization of the defined benefits/success criteria/objectives, especially for the known Must Have’s? |  | |  | |
| 1. If the remaining duration is at least 6 months, is there another health check scheduled? |  | |  | |
| 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 commitments? |  | |  | |
| 1. Are team conflicts identified and dealt with appropriately? |  | |  | |
| Comments: | | | | |
| **Communication** |  | |  | |
| 1. Are the appropriate team members and stakeholders participating in the demo at the end of each iteration? |  | |  | |
| 1. Are the backlogs accessible to all team members? |  | |  | |
| 1. Is appropriate documentation produced and distributed at the end of every iteration and increment/release (e.g. release notes, process flows, use cases, notes for operations, training material, etc)? |  | |  | |
| 1. Is the release plan viewable and understood by all team members and stakeholders? |  | |  | |
| 1. Is communication planned, or is it more reactionary? |  | |  | |
| 1. Are communication channels clear and efficient (e.g. developers and testers have direct access to each other)? |  | |  | |
| 1. Is there a common space/location (virtual and/or physical) for the team to work and collaborate together? |  | |  | |
| Comments: | | | | |
| **Risks and Issues** |  | |  | |
| 1. Is a regular review of all risks undertaken with appropriate stakeholders, resulting in appropriate risk updates, accountabilities, and documentation? |  | |  | |
| 1. Are realized risks being transferred and tracked through a backlog (or similar document)? |  | |  | |
| 1. Are issues managed, assigned, and recorded through to resolution within an iteration (and if not, transferred to backlog (or similar document))? |  | |  | |
| 1. Are issues and risks being escalated according to management plans? |  | |  | |
| 1. With what you know today, 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 or releases fail 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’s business benefits/values well understood by the team? |  | |  | |
| 1. Are there success criteria/metrics in place that are being used to measure the project’s delivery of benefits/value? |  | |  | |
| 1. Are the project objectives and benefits still relevant against the current scope and what has been delivered to date? |  | |  | |
| 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 (as a backlog item) 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 release cutovers, is it being used and working? |  | |  | |
| * 1. Are there defined deliverable acceptance criteria for release sign offs that are being used consistently before sign offs? |  | |  | |
| 1. Is it determined who will authorize a release to go to production? |  | |  | |
| Comments: | | | | |
| **Governance** |  | |  | |
| 1. Is governance reviewing appropriate checkpoints/milestones/releases 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 being adhered to? |  | |  | |
| Comments: | | | | |
| **Roles and Responsibilities** |  | |  | |
| 1. Are resource roles and responsibilities clearly understood? |  | |  | |
| * 1. Is it clearly understood and accepted that team members may adopt multiple roles, sometimes outside of their every day job description, to complete project work? |  | |  | |
| 1. Is there a single product/project owner for this project? |  | |  | |
| * 1. Does the product/project owner have the authority and knowledge (stakeholder perceptions) to prioritize scope items? |  | |  | |
| 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 (typically through user stories) to the extent required? |  | |  | |
| 1. Do the deliverables reflect the requirements? |  | |  | |
| 1. Are changes to requirements traceable to their source and justification? | |  | |  |
| 1. Are requirements traceable to backlogs (or similar documents), objectives, benefit(s), and success criteria? | |  | |  |
| 1. Can the testing be mapped to the requirements? | |  | |  |
| 1. Is testing documented with expected results, actual results, and appropriate acceptance? | |  | |  |
| 1. Where re-tests for defects are required, are they appropriately accepted 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: | | | | |