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: Program and Contact Information

|  |  |  |  |
| --- | --- | --- | --- |
| Program Sponsor |   | Interviewee Name |   |
| **Program Manager** |   | **Interview Date** | dd-mon-yyyy |
| **Program Timeline** | dd-mon-yyyy to dd-mon-yyyy | **Interviewer Name** |  |
| [**Program Phase**](https://uwaterloo.ca/it-portfolio-management/methodologies/project-management/project-success)**(bold or highlight program phase at the time of this questionnaire)** |  Definition / Benefit Delivery / Closure | **Projects Within Program** **(list the names of the projects contained within this program)** |  |

## 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 and Vision** |  |  |
| 1. Is the program staying within the documented scope?
 |  |  |
| 1. Does the program still align with the defined program vision?
 |  |  |
| 1. Are the program component deliverables contributing towards the vision?
 |  |  |
| 1. Are changes to scope being appropriately discussed, approved and documented?
 |  |  |
| 1. Is scope being managed appropriately against other program constraints (budget, time, quality)?
 |  |  |
| 1. Are the success criteria still relevant as the program evolves?
 |  |  |
| 1. Is management of the organizational change for the program occurring and continuing to align to the program’s scope?
 |  |  |
| 1. Is there still senior leadership commitment and assistance towards the vision, scope and organizational change for the program?
 |  |  |
| 1. Is the scope and vision still realistically achievable?
 |  |  |
| 1. Are the team(s) aware of the larger program scope and vision, and their role in achieving it?
 |  |  |
| 1. Are the team(s) working together towards a common program scope and vision?
 |  |  |
| Comments: |
| **Stakeholders** |  |  |
| 1. Do stakeholders still perceive benefit(s) from anticipated end deliverable(s), based on current scope?
 |  |  |
| 1. Have stakeholders received anticipated benefits from completed components and their deliverables?
 |  |  |
| * 1. Are stakeholders satisfied with received deliverables and benefits?
 |  |  |
| 1. Do the team(s) and program manager have adequate commitment and support from stakeholders for the program?
 |  |  |
| 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, benefit, quality, and time variations been subject to the change management process?
 |  |  |
| 1. Has the program management plan been adjusted to account for variations in approved changes?
 |  |  |
| 1. Is the plan for introducing organizational change being executed, monitored, and modified as appropriate?
 |  |  |
| 1. Is change readiness and acceptance continuing to be assessed as deliverables are introduced and the organizational change plan is being executed?
 |  |  |
| 1. Have impacted business processes (within IST and/or with IST clients) been handled appropriately for the changes delivered to date?
 |  |  |
| 1. Have impacts outside the University been handled appropriately?
 |  |  |
| Comments: |
| **Cost** |  |  |
| 1. Is there still commitment to fund the remaining components of the program required to ensure success and meet the program’s benefits and vision?
 |  |  |
| 1. Are costs and budget being appropriately monitored and forecasted?
 |  |  |
| 1. Is it probable there may be expenses that have not been accounted for beyond what is left in the contingency?
 |  |  |
| Comments: |
| **Roadmap/Schedule** |  |  |
| 1. Is a suitably detailed, up to date schedule and roadmap in place?
 |  |  |
| * 1. Is the schedule delivering on milestones and components that contribute towards program scope, benefits realization, and vision?
 |  |  |
| * 1. Are dependencies between components and external to the program reflected within the schedule and are they managed appropriately?
 |  |  |
| * 1. Is the schedule delivering according to predefined component priorities?
 |  |  |
| * 1. Is the schedule and roadmap being appropriately monitored and forecasted?
 |  |  |
| * 1. Are the project managers for the projects within the program communicating milestone achievements, time delays, et cetera to the program manager so that the program schedule and roadmap impacts and timelines are up to date?
 |  |  |
| * 1. Are quality measures and reviews included in the schedule and are they being done?
 |  |  |
| 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, vision, and success criteria?
 |  |  |
| 1. If the remaining duration is at least 12 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?
 |  |  |
| 1. Are status updates and schedule updates documented and communicated appropriately?
 |  |  |
| 1. If the schedule is dependent upon vendor deliverables, are there appropriate mitigations in place?
 |  |  |
| 1. Duration of programs typically span years, not months. Is the commitment still there by the team(s) and sponsor to see the program through to the end?
 |  |  |
| 1. As time passes with the program, is team morale remaining positive?
 |  |  |
| 1. Are you confident that work can be completed without concerns of burn out or overwork for the remaining tasks?
 |  |  |
| Comments: |
| **Quality** |  |  |
| 1. Are the right resources with the appropriate skills available to the program?
 |  |  |
| 1. Is quality being monitored and tracked according to the quality management plan for the program?
 |  |  |
| 1. Do the quality measures still align with benefit realization and expectations?
 |  |  |
| 1. Are deliverables within the program to date meeting quality expectations?
 |  |  |
| 1. Is quality being addressed appropriately when measures do not meet expectations or requirements?
 |  |  |
| Comments: |
| **Communication** |  |  |
| 1. Is the communications plan being implemented, monitored, maintained, and changed appropriately?
 |  |  |
| 1. Are the appropriate stakeholders being communicated to and managed, according to their impact and interest?
 |  |  |
| 1. Are the key stakeholders still committed and supportive?
 |  |  |
| 1. Is status and change being communicated to governance, team(s), sponsor, and other stakeholders on a regular basis?
 |  |  |
| 1. Is the organizational change resource in constant contact with people impacted by the change?
 |  |  |
| 1. Is the organizational change resource communicating with the program manager on the acceptance of changes delivered to date and impacts for upcoming changes on the program roadmap?
 |  |  |
| 1. Do the team(s) have access to program documentation?
 |  |  |
| 1. Is there an effective communication flow between the program manager and the project managers managing the project components?
 |  |  |
| Comments: |
| **Risks and Issues** |  |  |
| 1. Are regular risk reviews undertaken, as identified in the risk management plan, resulting in appropriate program risk updates?
 |  |  |
| 1. Are program risk owners monitoring and mitigating risks appropriately?
 |  |  |
| 1. Are realized program risks being transferred and tracked through the program issues log?
 |  |  |
| 1. Are program issues managed, assigned, and recorded through to resolution?
 |  |  |
| 1. Is the time required to resolve program issues appropriately reflected in schedules and roadmaps?
 |  |  |
| 1. Is escalation of risks and issues being handled according to the management plan and governance structure for program risks/issues, and for component risks/issues?
 |  |  |
| 1. Are you confident that there should be no unexpected “show stoppers” at this point in time for remaining components and benefits realization?
 |  |  |
| 1. Are risks and issues at the component level that could impact program timelines, benefits, vision, and/or scope being communicated to program manager in a timely manner?
 |  |  |
| Comments: |
| **Contingency Planning** |  |  |
| 1. Is there an approved contingency plan in place if the program fails to meet the constraints (scope, schedule, quality, or budget) or deliver the expected organizational change and benefits?
 |  |  |
| * 1. Does the contingency plan still make sense with the changes that have been implemented to date, and is it still supported by governance?
 |  |  |
| * 1. Are program deliverables and organizational change status being assessed according to identified checkpoints within the contingency plan?
 |  |  |
| * 1. Is the contingency plan being updated appropriately, according to what has been happening in the program? (e.g. if significant change has been introduced to date with program deliverables, but if future deliverables are in jeopardy, it may not be feasible to back out of all of the change already delivered so what should be done for contingency from this point forward?)
 |  |  |
| Comments: |
| **Benefits** |  |  |
| 1. Are program benefits being appropriately managed and monitored?
 |  |  |
| 1. Have program benefits been realized with completed components to date?
 |  |  |
| * 1. Were the realized benefits recorded and measured in the benefit register?
 |  |  |
| * 1. Are the measurements for the realized benefits producing positive results?
 |  |  |
| * 1. Are the realized benefits being continuously monitored and measured as program work continues?
 |  |  |
| 1. Are the remaining program benefits still relevant?
 |  |  |
| 1. Do the remaining program benefits still align with stakeholder expectations and program vision/scope?
 |  |  |
| 1. Is the program manager aware of impacts to benefits due to issues, changes, and/or delays with program components?
 |  |  |
| * 1. Are these impacts to benefits being discussed with benefit owners, sponsor, governance, and others who may be impacted?
 |  |  |
| * 1. Are appropriate changes due to these impacts being made and documented?
 |  |  |
| 1. Is the organizational change for the realization of benefits managed appropriately?
 |  |  |
| Comments: |
| **Training** |  |  |
| 1. Is training being executed according to the training plan?
 |  |  |
| 1. Does the training plan still make sense based on changes that have been made to the program?
 |  |  |
| Comments: |
| **Governance** |  |  |
| 1. Is governance reviewing appropriate checkpoints/milestones throughout program benefit delivery (execution)?
 |  |  |
| 1. Are governance committee(s) acting according to terms of reference and defined roles/responsibilities?
 |  |  |
| 1. Is governance making escalated decisions in a timely manner to keep the program moving?
 |  |  |
| 1. Is governance still aligned, committed, and supportive of the program’s vision?
 |  |  |
| 1. Do the sponsor’s actions demonstrate accountability for the success of the program?
 |  |  |
| 1. Is governance providing the correct level of support and removing the roadblocks in a timely manner?
 |  |  |
| 1. Is the program management [methodology](https://uwaterloo.ca/it-portfolio-management/methodologies/program-management/program-closure) 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 Program Manager been provided with the appropriate information and authority within the program to manage the program and be responsible for the success of the program?
 |  |  |
| 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 program risk, complexity, size, duration, and impact of organizational change?
 |  |  |
| 1. Are the major documents generally well-constructed and up-to-date?
 |  |  |
| 1. Is the documentation for the program stored in a central location with appropriate accessibility?
 |  |  |
| Comments: |
| **Requirements**  |  |  |
| 1. Are acceptance criteria for the deliverables defined and documented to align with planned benefits?
 |  |  |
| 1. Are proposed changes to component requirements discussed with the program manager in a timely manner if they impact program vision or benefits or scope?
 |  |  |
| Comments: |
| **Procurement (Please answer these questions only for procurement that is at a program level, not a project level)** |  |  |
| 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. Do the contracts/statements of work clearly define the work and deliverables, with dates, that the vendor is expected to deliver?
 |  |  |
| * 1. Is the vendor delivering according to quality and timeline expectations?
 |  |  |
| * 1. Is there a possibility of additional costs related to the vendor that were not accounted for in the program budget?
 |  |  |
| 1. Is the program manager actively managing vendor relations with respect to the constraints and contracted deliverables?
 |  |  |
| Comments: |
| **Resources** |  |  |
| 1. Do the current team(s) still adequately represent the voice and expectations of the stakeholders?
 |  |  |
| 1. Are the teams being provided with the necessary tools, skills, and processes to continue with the program work?
 |  |  |
| 1. Do the resources continue to have support and commitment from their managers for the time they are spending on the program, and still need to commit?
 |  |  |
| 1. Is there still a resource with strong organizational change skills working with the program?
 |  |  |
| Comments: |