Project Health Check

An assessment tool to evaluate the robustness of thinking in 3 key areas:

- **Foundation thinking** covering the reasons why you are doing the project, the change issues, the desired outcomes and the scope of the project
- **Project planning** covering your delivery objectives, method and approach, more detailed plans including resourcing and risk management
- **Project governance and infrastructure** covering client and project management arrangements, contracts, team arrangements, communications and processes for learning

Project Health Check

This tool help you assess the current health of your project and decide on the improvements needed to secure success.

The tool examines your thinking and organisation within 3 key areas:

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You can self assess using a scale 1-4; the definitions are:

Level 1	**Embryonic and early stage thinking**
Level 2	**Developing but rather limited**
Level 3	**Motoring and much more comprehensive**
Level 4	**Formed and robust**

The next sheet provides an overview of the key areas for assessment, a summary of your assessment scores and your assessment of what needs to be worked on now.

To complete your assessment, run your project against each of the key areas and sub elements. For each sub element you will see a description of progress at each of the 4 levels. You may think that your project does not fit neatly into one of the elements but look for the best fit overall and then log your assessment. The assessment tool is based on the book People, Projects and Change by Pat Pegg Jones and Simon Standish (Premium Publishing ISBN 0-9550411-2-0 June 2006 www.peopleprojectsandchange.com). You will find material within the book to help you.

Project Health Check

3 Key Areas for Assessment	Sub elements	Your assessment (Levels 1-4))	Priorities for improvement (H/M/L)
Foundation Thinking	1. The reason for the project, the problems, opportunities and desired benefits/outcomes (beyond the project life)		
	2. The change issues including stakeholder assessments and strategies for engagement		
	3. The boundary and scope of the project-what is in and what is out		
Project Planning	4. The delivery objectives for the project (within its life)		
	5. The big picture process (method and approach)		
	6. The detailed plan of activities and process (tools and techniques)		
	7. The resourcing for the project		
	8. The assessment of risks		
Project Governance and Infrastructure	9. Client roles and responsibilities, and overall governance		
	10. Project Management arrangements and contracting		
	11. Teams, their membership, roles ,responsibilities and working arrangements, and other engagement methods		
	12. Communications (internal within project and outside)		
	13. Learning (to improve the approach within life and afterwards)		

Level 1	Embryonic and early stage
Level 2	Developing but rather limited
Level 3	Motoring and much more comprehensive
Level 4	Formed and robust

Project Health Check

Assessment area	Level 1-Embryonic	Level 2-Developing	Level 3- Motoring	Level 4-Formed and Robust
1. The reason for the project, the problems, the opportunities and the scope of the project	▪ The problem/situation is sketchy ▪ The problem and situation seems very messy with multiple issues and dependencies ▪ There is a big "grey" box of issues ▪ This seems big and rather unwieldy at this stage ▪ We are wrestling with the key questions ▪ Our assessment is limited to a small group of people ▪ It is our position and has not yet been agreed with our clients	▪ We have defined the problem and opportunities ▪ We can see the cause and effect relationships ▪ We have a good feel for the terms of reference and what we are being asked to take on ▪ Our clients are engaged in the discussion on terms of reference and scope	▪ We have defined the problem (s) and we understand the key contributors ▪ We understand the opportunities (beyond the time period of the project) ▪ We have mapped out what we must examine in the project and what we feel needs to be excluded ▪ The outline assessment is agreed by clients and sponsors but not understood outside of the project	▪ We have defined the problem (s) and we understand the key contributors ▪ We understand the opportunities (beyond the time period of the project) ▪ We are clear about what is in the project and what will not be undertaken ▪ The assessment is shared by clients/sponsors and senior project members and understood by the organisation ▪ The terms of reference (what is in and what is out) has been published and is understood by the project and by key stakeholders

Assessment area	Level 1-Embryonic	Level 2-Developing	Level 3- Motoring	Level 4-Formed and Robust
2. The change issues	▪ We only have a general notion of the impact of this project for people in the organisation and outside ▪ We have identified a preliminary number of stakeholders internally who may be affected by the project ▪ Our assessment is limited to a small group of people	▪ We have a more precise view of the possible changes and impact of the project ▪ We understand who the key stakeholders are internally and externally ▪ We have ideas but not plans for the engagement of people in the project	▪ We understand the nature of change expected of people internally and externally within the project life and after ▪ We know who the key stakeholders are ▪ We think we know who is key to success ▪ We have begun to consider how to best involve people in the project ▪ Our assessment is based on contribution from the key project clients and sponsors	▪ We have assessed our project for the changes that impact on people in the short and long term ▪ We know who the stakeholders are ▪ We have assessed the stakeholder interest in this project ▪ We know who is key to the success of this project in terms of achieving the end outcomes ▪ We understand their starting positions in term of state of readiness and commitment to change ▪ We know how key stakeholders wish to be involved ▪ We have a plan for engagement ▪ We have identified phases of change and have matched engagement processes to suit each phase

Assessment area	Level 1-Embryonic	Level 2-Developing	Level 3- Motoring	Level 4-Formed and Robust
3. The desired end results, benefits and outcomes enabled by this project (but beyond the life of the project)	▪ We only have a general notion of what might be enabled in the longer term through this project ▪ The outcomes and benefits tend to be described in internal organisational terms rather than benefits for customers and users and bottom line performance terms ▪ Our assessment is limited to a small group of people ▪ It is our position and has not yet been agreed with our clients	▪ We have broadened our understanding of benefits to cover user and customer benefits and overall organisation performance ▪ We know how to quantify some of these benefits ▪ The benefit discussion has been confined to those closely associated with the project	▪ Our benefits and outcomes cover user and customer benefits as well as staff and organisational ▪ We have quantified the benefits and long term outcomes enabled by the project ▪ We have validated these benefits with key stakeholders ▪ We have validated the benefits on the basis of performance achieved by similar projects elsewhere	▪ Our benefits and outcomes cover user and customer benefits as well as staff and organisational ▪ We have validated the benefits on the basis of performance achieved by similar projects elsewhere ▪ We have validated these benefits with key stakeholders ▪ The benefits and outcomes have been agreed with clients and sponsors ▪ The have been published and are understood within and outside of the project

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4. The delivery objectives for the project (expected within the life of the project)	▪ We have identified the overall product required within the time frame of the project ▪ The product(s) have not yet been given any success criteria ▪ The clients and sponsors have not yet agreed the products	▪ We feel clear on what needs to be delivered by the project within the project life or duration ▪ We have prepared proposals for the time, cost and quality criteria ▪ We have engaged our clients and sponsors but not more broadly	▪ We are clear on what needs to be delivered by the project within the project life or duration ▪ The product(s) has a clear time delivery requirement ▪ The product(s) have a cost envelope agreed ▪ There are some quality criteria ▪ Key stakeholders have been consulted on the success criteria	▪ We are clear on what needs to be delivered by the project within the project life or duration ▪ The product(s) has a clear time delivery requirement ▪ The product(s) have a cost envelope agreed ▪ The product(s) have clear quality criteria ▪ The change management objectives are included within the success criteria for the project ▪ The Clients and Sponsors have signed off the project product

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5. The Big Picture Process (methodology and approach)	▪ We have identified a methodology or standard approach for doing the work and achieving the project product ▪ We have identified the big pieces of work required to achieve the overall product	▪ We have identified a methodology or standard approach for doing the work and achieving the project product ▪ The big pieces of work have been described ▪ We are exploring the dependencies ▪ Our project clients and sponsors have been involved in the discussions	▪ The methodology and approach is supported within and outside of the project ▪ Our project clients and sponsors have been involved in the discussions ▪ The big pieces of work are understood ▪ The dependencies seem clear ▪ Overall timescales have been set out in outline terms but require validation once the detailed planning is complete	▪ The methodology has credibility externally ▪ The big pieces of work are understood ▪ The dependencies are clear ▪ The overall timescales have been validated by the more detailed plans ▪ The Project Milestones are clear and assessable/measurable ▪ Our clients and sponsors own the plans at this higher level

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6. The detailed planning of activity, tools and techniques	▪ We have begun to take the big pieces of work and broken them down for activities ▪ We have a rough view of the analytical tools and techniques we will use ▪ We have a rough view of the engagement tools and techniques we will use as part of the change management process	▪ We have taken each of the big pieces of work ▪ We know the tools and techniques we will use ▪ We have begun to identify activities and time required ▪ We have begun to identify who will do the work	▪ We have taken each of the big pieces of work ▪ We know the tools and techniques we will use ▪ The tools and techniques reflect the need to effectively engage key stakeholders ▪ We know what needs to be done and the interdependencies ▪ We have a gantt chart showing the activity and its duration with key responsibilities	▪ We have taken each of the big pieces of work ▪ We know the tools and techniques we will use ▪ The tools and techniques reflect the need to effectively engage key stakeholders ▪ We know what needs to be done and the interdependencies ▪ We have a gantt chart showing the activity and its duration with key responsibilities ▪ Everyone in the team is conversant with the plan ▪ We have commitment within the team to the plan ▪ Key stakeholders understand the plan

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7. Resourcing for the Project	▪ We know the skills and expertise required for this project ▪ We know who has been allocated to the project ▪ We have begun to think about people against tasks and the time needed from them ▪ We have identified other areas of cost ▪ We do not yet know how much this project will cost	▪ We know the skills and expertise required for this project ▪ We know who has been allocated to the project ▪ We feel clear on how much time is required of team members ▪ We have assembled cost proposals for other expenditure ▪ These proposals have been put together as a project cost proposal for submission to clients and sponsors	▪ We know which staff will work in the project ▪ We feel clear on how much time is required of team members ▪ Staff are clear on their required time commitment and this has been secured with other managers ▪ We have assembled cost proposals for other expenditure ▪ Other areas of expenditure have been agreed with clients and sponsors ▪ Procurement of other services and products is well under way	▪ We feel clear on how much time is required of team members ▪ We know which internal staff will be used ▪ An allocation of time has been made on an individual basis and their availability has been secured ▪ Other areas of non-staff cost has been identified ▪ There is a budget for resource and this has been agreed ▪ There are clear authorities for procuring resources and controlling costs ▪ Contracts for services/products are in place ▪ Reporting processes on financial performance are in place

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8. The assessment of risks	▪ We have reviewed the outline big pieces for work and identified what could go wrong ▪ The assessment is confined to those closely associated with the project	▪ We have reviewed the big pieces of work and the more detailed plans for likely problems ▪ We have assessed the likely problems for cause and impact ▪ We have consulted in and outside of the project on the problems	▪ The problems have been identified ▪ The problems have been ranked for probability and seriousness ▪ Preventive and contingent actions have been identified against the more probable and higher adverse impact problems ▪ Actions have been costed and added to budget proposals	▪ We have undertaken a formal risk assessment ▪ Project members, Clients, Sponsors and some key stakeholders have been involved ▪ Preventive actions (to avoid high risk problems) have been taken ▪ We have set up contingency plans for those high risk problems ▪ We have a way of spotting the problems and initiating action ▪ There is a process in place to monitor the risks and analyse for newly emerging risks

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9. Client Roles and responsibilities and overall governance	▪ The client has been identified ▪ The client is in early discussions on the requirements for the project ▪ There are proposals for overall direction and performance management of the project (i.e. a Steering Group) ▪ The composition and modus operandi of a Steering Group have not been agreed	▪ We have clients and we have sponsors ▪ The clients are progressing discussions on the requirements for the project ▪ The different roles are understood and agreed ▪ A steering group has been established and has met to discuss its role and way of working (formally and informally)	▪ We have clients and we have sponsors ▪ The different roles are understood and agreed ▪ The authorities and accountabilities are laid down in writing ▪ The Steering Group has been properly established with a clear view of the project and with an schedule of meetings ▪ The arrangements have been formalised and communicated through the project and with key stakeholders ▪ The client has agreed the overall requirements for the project	▪ The client has agreed the overall requirements for the project ▪ We know who the client(s) is for this project ▪ It is absolutely clear who will take decisions on the specification and any changes ▪ A steering Group has been set up ▪ There are clear and agreed roles, responsibilities and working processes for the Steering Group ▪ Performance reporting has been agreed and is in operation ▪ There are supporting project and administrative processes in place to support top level governance ▪ Process for agreeing change during the project are clearly established

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10. Project Management arrangements and contracting	▪ A project manager has been identified and is in place ▪ Discussions are underway between the Client and Project Manager to explore the requirements, tricky issues and respective roles	▪ Role and authorities have been agreed for the project manager ▪ There is a good understanding between the project manager and the client/sponsor on how they will work together ▪ The overall requirements for the project in terms of desired outcomes and product have been agreed ▪ Negotiations are underway between the project manager and the client for resources and a budget	▪ Project manager is in place ▪ Role and authority has been defined and agreed with the clients/sponsors ▪ Resources and staff have been assigned to the Project Manager ▪ A project support office is being established ▪ There is a clear expectation on time required from the project manager to manage the project and this time has been accessed ▪ The client/sponsor and project manager have agreed how they will work together	▪ The Project Manger's authority for decision making is clear ▪ Their role in managing project team performance is understood and there are processes in place to secure this ▪ Their role and authority in agreeing to variations in the project is clear ▪ Time for project management has been agreed and is available ▪ The leader/manager has a budget for staff and non staff expenditure ▪ The project manager has sufficient support to enable tracking and communication on project issues ▪ Personal objectives have been agreed with the project manager ▪ A contract for delivery is in place between the project manager and the client/sponsor

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11. Teams their membership, roles, responsibilities and working arrangements, and other engagement methods	▪ The need for team(s) has been established ▪ We know what skills and experience we need ▪ Potential membership has been agreed ▪ Plans have been made for establishing and briefing the team ▪ We recognise the need to set up other ad-hoc working processes	▪ Team membership is clear ▪ There is common understanding on the requirements from the project but not the detail of the process ▪ Team members have agreed participation rate with line managers ▪ It is clear how the team will work together and apart ▪ General roles and contribution have been agreed ▪ We have begun to assess how to involve other key stakeholders	▪ Some education and training of the team has bee initiated around key project elements ▪ Team members understand the project delivery requirements and the plan ▪ Team members are aware of the skills and expertise resident in the team ▪ A schedule of team meetings has been agreed ▪ Team members are in regular e-mail contact ▪ There a plans for establishing other working processes to engage stakeholders (i.e. workshops, forums)	▪ Membership of the project team is clear ▪ There are clear objectives for the team ▪ Roles and expected contributions are clear ▪ There is explicitness of feedback on performance and contribution ▪ There is a development plan to enable group work and team members are well inducted ▪ There are means for communication between members when they are not together ▪ Shared information systems are in operation ▪ Team members are in regular e-mail contact ▪ Other working processes have been programmed and established ▪ Individual performance review processes are in place ▪ There is a process for recognising performance on the project

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12.Communications and reporting arrangements	▪ The project has been communicated to the organisation (s) ▪ Work had begun on a communications plan for internal and external stakeholders ▪ Work has begun to understand reporting around key milestones and the performance criteria	▪ The communications needs of the team members have been taken into account ▪ There is a schedule of meetings for the project team ▪ The communications requirements of stakeholders have been assessed ▪ A strategy for information exchange and engagement of stakeholders has been agreed ▪ We are working on a project performance management system around the key performance goals	▪ The performance criteria and key reporting requirements are clear ▪ Reports and meetings have been designed and established ▪ A strategy for information exchange and engagement of stakeholders has been agreed ▪ A schedule of communications activity has been established for internal and external stakeholders ▪ Administrative systems are in place to prepare, delivery and follow through on key communications activity ▪ A project performance management system has been established around the key performance goals	▪ The performance criteria for the project is clear at the big picture and detailed levels ▪ Performance is measured and reported on at agreed time intervals ▪ The need for information for various groups/individuals is clearly understood ▪ There is a communications plan to support internal project working and to enable understanding outside of the project ▪ Information technology is used for briefing and for virtual working ▪ There is a communications plan to cover key project communications outside of the project team ▪ Roles and responsibilities are clear ▪ A crisis procedure exists for project communications

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13. Learning and evaluation	▪ The need for review and learning is agreed ▪ Ideas have been shared on how this might be done formally and informally	▪ Allocation of time within normal meetings for review and reflection ▪ The review considers aspects of performance and what is being achieved ▪ Learning and reflection is mainly done by members of the team	▪ Special time has been allocated for review and learning ▪ The review considers aspects of performance and what is being achieved ▪ Feedback is gained from clients and sponsors on performance ▪ Discussion is on results and the process of the project ▪ Learning and evaluation is undertaken periodically	▪ There are mechanisms in place to review performance and the process of the project ▪ There is an allocation of time to do so ▪ There is a culture of encouragement for reflection and learning ▪ Clients, Sponsors, project team members and stakeholders can feedback their views ▪ Learning is made explicit and recognised ▪ Processes are in place to effectively recognise performance and learning derived by team members