

# Project Health Review Template

## Introduction

The purpose of this document is to help you to periodically capture overarching thoughts from project team members about a project’s health status. The goal of a project health review is not to evaluate any one person or specific role, but rather to understand if there is any cause for concern within the project and address it as soon as possible.

These indicators and questions should act as a conversation support tool. Some conversations within teams can be difficult and uncomfortable; however, it is most often those conversations that lead to a successful path for the project. It is strongly suggested that this be completed in collaboration with the entire project team and serve as a time of reflection to help the team move forward together to achieve its goals. The frequency of these conversations is to be determined by the team; however, it is recommended that a review occurs quarterly, to plan and course direct appropriately. Depending on the phase of the project, some areas may be more relevant at any given time in the project.

Below you will find a list of high-level indicators which may strongly impact progress or success, followed by a sample list of questions (not an exhaustive list) tied to each indicator that might indicate cause for concern.

## Project Health Indicators

*Check the box if there is a concern, risk, or alert that should be documented and/or addressed in any of the following categories:*

	Yes	No	Qualified No
Project Leadership/Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Governance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scope of Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timeline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Technical Approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sustainability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Project Health Considerations

*For each applicable question, discuss and document conversations among the group.*

### **Project Leadership/Management**

- Does leadership support the overall mission and strategic goals of the project?
  - Does leadership secure the necessary resources and cooperation to support the project's success?
  - When is leadership input required? Does leadership provide feedback and/or approve/deny proposed activities that require their review?
- Are there missing skill sets in the project team and/or contractors that are needed for project success?
- Are contractors best suited for and performing designated activities as expected?
- Is there high turnover among project team members? Are there frequent vacant positions within the project team?

### **Project Governance**

- Is there a strong data governance plan with mission, vision, and roles and responsibilities clearly articulated?
- Are there any outstanding decisions for the project that need to be addressed by the project leadership and/or governance structures?
- Are the right people actively engaged in the right committees or decision-making activities?
  - Do they have the appropriate authority and responsibility to do their job?
- Does the project have sufficient and timely access to the necessary data sources and data requirements to complete the project?

### **Project Communication**

- Is there a clear communication plan and/or talking points about the project?
- Is there a common repository for key project documents and communication tools?
- Are there clear communication processes between the project team and contractors?
- Do you know who to go to with concerns about specific issues in the project?
- Are you comfortable raising concerns about project processes and/or problems during team meetings or one-on-one with leadership?
- Does everyone on staff know how to effectively communicate about this project with other departments?
- How is the communication between the implementation team and internal and/or external stakeholders?

### **Scope of work**

- Does the project have a clear purpose and vision with clearly documented objectives and deliverables?
- Is the project scope clearly defined and communicated with all project team members and internal and external stakeholders?
- Has any new request or requirement changed that may impact, either adversely or positively, the scope? How are changes made to scope overseen (governance structure/processes)?
- Is scope creep a continual issue?

### *Timeline*

- Is there an on-time, clear schedule of deliverables and understanding of dependencies that will meet the project timeline?
- Are there any blockers or delays for the project schedule? Is this mitigation plan clear and known by all necessary team members?
- Will the data be available according to the project schedule and of high quality?
- If data availability is a problem, which data source(s) present a problem and in what way (e.g., timing, quality, frequency)? Is there a clear plan to mitigate the problem?

### *Budget*

- Are there project risks that may impact the project budget?
- Is the budget aligned with current deliverables (i.e., with no overruns or additional requests for funds)?
- Is there a need and/or concern around sustainability funding?
- Are there particular areas of the project or particular contractors that generate persistent areas of concern with regard to the budget?
- Is it clear at any given moment if the planned budget is on target by category?
- Are there periodic budget reviews to anticipate risks to the budget?

### *Technical Approach*

- Is the technical approach of the project well documented and understood by the project team?
- Is the technical approach of the project aligned with the project vision, scope, and deliverables?
- Is the data required for the project scope going to be aligned and available in a timely fashion via the planned project technical approach?
- Are any technical components out of alignment or at risk?
- Does the technical approach align with the data of the project including historical years and any potential changes to the data structure in the future?
- Are there areas of the scope/approach that could be modified to better utilize existing technical assets?
- Does the team understand the necessary data sources for the project?
- Are data owners informed about and engaged in the project planning?

### *Sustainability*

- Has leadership developed and articulated a clear sustainability plan with clear roles and responsibilities?
- Are there aspects of the project that are specific to the site/project implementers that would inhibit the sustainability of the project post project?
- Is the site/organization prepared to continue the solution, including having trained and skilled staff dedicated to maintaining the work and (provided the time and resources) keep it running?
- Knowledge Transfer
  - Is the project team clear on the plans, timing, and activities for knowledge transfer?
  - Is the approach for knowledge transfer clear and on track?
  - Is knowledge transfer, including documentation and knowledge transfer sessions, planned for, and being effectively executed throughout the project?