**Project Review Worksheet**

A project review provides an opportunity to step back and evaluate a project that is currently underway, often when a project experiences delays or is otherwise in trouble. The Project Reviews is intended as a mechanism to help the Project Manager identify problem areas and create a plan to address them. Project reviews can take many forms, but a common approach is to evaluate resources, leadership structures, quality assurance measures, and expectations to ensure that the project has appropriate support at the organizational level.

The Project Manager should work through these questions prior to a Project Review.

**Project Status**

This section should identify the primary issue(s) that currently put the project schedule, budget, or deliverables at risk. For any no answers, please elaborate.

* Is it **likely**, **questionable**, or **unlikely** that the project in its current state will meet the following?
	+ Business needs of the stakeholders with acceptable quality
	+ Schedule
	+ Budget
* What are the critical current issues facing the project? (Issues are current problems that must be solved.)
* What are the critical potential risks facing the project? (Risks are potential problems that may occur.)

**Project Purpose**

Problems arise when the intent and purpose of a project are not clear. Questions in this area include the following. For any “no” answers, please elaborate.

* What is the purpose of the project?
* What are the specific deliverables?
* How will you measure success? This should be a list of success criteria.
* Are the purpose, objectives, and deliverables understood and agreed upon by all primary stakeholders?

**Governance**

Problems arise when the projects lack adequate governance. Governance... For any “no” answers, please elaborate.

* Does the project have a sponsor?
* If the project (some criteria), does it have an executive sponsor?
* If the sponsor or executive sponsor does not have sole authority to set project priorities and resolve escalations (eg. the project impacts multiple organizations with different senior management), does the project have a steering committee?
* Have any issues that the PM can’t resolve been escalated to the sponsor?
* Is the sponsor engaged, informed, and responsive?
* Does the sponsor have the authority to set project priorities?

**Scope**

Problems arise when the scope of a project is unclear or when the stated scope of a project will no longer meet business objectives. For any “no” answers, please elaborate.

* Is there a clear scope that is understood and agreed upon by primary stakeholders?
* Is there agreement as to what is out of scope?
* Were requirements collected from and verified by all primary stakeholders?
* Were individual work packages clearly identified? [Link to work package description?]
* Does the scope satisfy all critical business objectives? If not, why is the scope inadequate?
	+ Were project deliverables not sufficiently defined at the start of the project?
	+ Did something change?
	+ Have users added features that are not critical to the purpose of the project?
	+ Did the project team discover something during the project that revealed additional issues require a change to scope.
	+ Is there an opportunity for a phased approach?
* Have the number of organizations or the level of impact on the organizations changed since the scope was set?
* Are any new business processes and other organizational impacts understood by and agreed to by primary stakeholders and users?

**Resources**

Problems arise when there are insufficient, under performing, or mis-aligned human or financial resources associated with a project. For any “no” answers, please elaborate. Make sure to account for all resources required for project success and not just assigned project resources.

* Is the current budget sufficient?
* Roles and responsibilities - are roles and responsibilities of team members and any external stakeholders clearly defined and understood?
* Decision making - for each area (technical, functional, etc.), is one person experienced enough to weigh options and make final decisions (eg. a tech lead)?
* Is the client able to adequately participate in requirements gathering and testing?
* Capacity - do team members or external resources have enough work-time to complete their work? If not, what are their competing obligations? (ie. other projects, operational duties, vacations, sick leave, etc.)
* Performance - are team members or external resources performing to expectations?
* Knowledge - do team members or external resources have the knowledge or experience to complete their tasks?
* Alignment - does the project have all the required roles? (eg. if technical decisions must be made, someone who has the authority to make those decisions is affiliated with the team.)
* Commitment and morale - are project team members and external resources enthusiastic about the project? If not, is there a root cause that impacts morale and commitment?

**Timeframe**

Problems arise when the timeframe for a project is inadequate. For any “no” answers, please elaborate.

* Was the original timeframe adequate given the initial project definition?
* Is the original timeframe adequate now? If not and if the reason is not described in other sections of this document, describe it here.

**Schedule Control**

Problems arise when appropriate tools and processes are not in place to track and manage the project schedule. For any “no” answers, please elaborate.

* Does the project have a project plan with dates and milestones identified? (Provide a copy for the project review.)
* Do project team members agree that the times for their work is realistic?
* Did primary stakeholders understand and accept the timeframe?
* Is padding included to account for vacations, sick leave, unforeseen problems?
* Does the project plan have sufficient detail to predict completion dates of key tasks and work packages such that delays can be quickly identified and addressed?
* Are dependencies clearly defined?
* Has the critical path been identified?
* Are tasks clearly aligned with individual deliverables?
* Are tasks and action items tracked against the schedule?
* Do team members report delays and issues to the PM in a timely manner?

**Communications**

Problems arise when communication is inadequate. For any “no” answers, please elaborate.

* Is project status communicated to primary stakeholders on a regular basis?
* Are there regular project team meetings?
* Are notes and action items captured for all project meetings?
* Are there regular meetings with project governance?

**Issue and Risk Management**

* Are issues and risks tracked and regularly reviewed and prioritized?
* Do issues and risks have mitigation plans identified and implemented where possible?

**Quality Assurance**

* Given the current project status, will success criteria be met?
* Have acceptable levels of quality been discussed and documented?
* Does the technology or other component of the system as currently defined allow delivery of high priority features with acceptable quality?
* Is there a robust unit and user testing plan and adequate time for revisions and retesting?
* If data migration is required,
	+ Is the existing data quality acceptable?
	+ Is there a clear data migration plan?