

**Project Planning Evaluation Checklist**

**Project Name:** \_\_\_\_\_

**Prepared By:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**A EVALUATION**

WBS #	Item	Status	Comments/ Plan to Resolve
1	<b>Planning</b>		
1.1	Is the project statement -- scope, definition and objectives -- the same as agreed to in the project initiation process and/or in the vendor contract?		
1.2	Has the Project Scope Statement been reviewed as part of the baseline process?		
1.3	Is there a baseline plan against which to measure progress?		
1.4	Does the baseline plan address the following areas:		
1.4.1	Project Scope, Deliverables, and Milestones		
1.4.2	Work Breakdown Structure		
1.4.3	Task Plans, Estimates, Resource Assignments		
1.4.4	Task Dependencies		
1.4.5	Project Schedule		
1.4.6	Milestone Schedule		
1.4.7	Project progress tracking		
1.4.8	Issue Resolution and Change Management		
1.4.9	Quality Plan		
1.4.10	Risk Management Plan		
1.4.11	Project Organization		
	Other Plans as needed:		
1.4.12	Facilities Plan		
1.4.13	Documentation Plan		
1.4.14	Materials Plan		
1.4.15	Training Plan		
1.4.16	Back-up and Recovery Plan		
1.4.17	Contingency Plan		
1.4.18	Cut Over Plan		
1.4.19	Warranty Plan		
1.4.20	Transition Plan		
1.4.21	Others		

WBS #	Item	Status	Comments/ Plan to Resolve
1.5	Is the plan for project resources adequate?		
1.6	Are the original project schedule and budget realistic?		
1.7	Is the plan for the organization of the project resources adequate?		
1.8	Are there adequate project control systems?		
1.9	Is there an information system for the project?		
1.10	Were key project stakeholders brought into the Project Plan?		
1.11	Were potential customers involved early in the planning process?		
1.12	Was planning completed before the project was initiated?		
1.13	Is the plan under configuration management?		
1.14	If there are vendors, have they signed off on the Project Plan?		
1.15	If there is an independent oversight contractor, have they signed off on the Project Plan?		
2	<b>Organization</b>		
2.1	Is the project organization documented and on file?		
2.2	Is the Project Manager qualified and experienced in Project Management?		
2.3	Have roles and responsibilities of the team been documented and clearly communicated to the team, customer, and stakeholders?		
2.4	Is the organization structure appropriate for the project's size and complexity?		
2.5	Is there an identified role of a technical leader (i.e., Project Lead, Team Lead, Solution Architect)?		
2.6	Is the quality function identified and assigned?		
2.7	Is the Project Sponsor function identified and defined?		
2.8	Is there a Change Management Board?		
2.9	Have the Configuration Management functions been assigned?		
2.10	Are there backup strategies for key members of the project?		
2.11	Other Organization items:		
3	<b>Tracking &amp; Monitoring</b>		
3.1	Are the various types of reports, their contents, frequency, and audience defined and communicated to the project team?		
3.2	Are the input requirements from the team members clearly documented and communicated?		
3.3	Have the reports to be produced, distributed, and filed been defined?		

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3.4	Has the format for tracking and monitoring schedules and costs been defined?		
4	<b>Reviewing</b>		
4.1	Have the various meetings, the purpose, context, frequency, and participants been defined and communicated?		
4.2	What are the defined meeting materials?		
4.3	Are the meetings set up to have assigned note takers that will add actions/issues to the issue list?		
5	<b>Issue Management</b>		
5.1	Is an Issue Management Process documented and filed?		
5.2	Is this process communicated to the customer and team members?		
5.3	Will an issue form be in use?		
5.4	Will all project issues be unconditionally tracked through the issue resolution process?		
5.5	Will all tasks resulting from issues be entered into the Project Plan and tracked through the plan?		
5.6	Are there processes for unresolved issues to be escalated and resolved within a reasonable timeframe?		
6	<b>Change Control</b>		
6.1	Will there be a Change Control Process in place?		
6.2	Is the Change Control Process documented and on file?		
6.3	Will this process be communicated to the customer and project team?		
6.4	Will there be a change request form in use?		
6.5	Will all project deliverable and software configuration management be changed only through the change control process?		
6.6	Will all change requests be unconditionally tracked through this process?		
6.7	Will all change requests and current status be logged?		
6.8	Will all tasks resulting from approved changes be entered into the Project Plan and tracked through the plan?		
6.9	Will new change requests be acknowledged in a timely manner?		
7	<b>Risk Management</b>		
7.1	Will the project risks being managed be according to the project's risk management process?		
7.2	Will the Risk Plan be updated on a regular and frequent basis?		
7.3	Will the Risk Status be reported to management on a regular and frequent basis?		
7.4	Will the risk documents be filed?		

WBS #	Item	Status	Comments/ Plan to Resolve
7.5	Will there be documented contingency plans for the top 5-10 risks?		
7.6	Will the Preventive Plans for the top 5 risks be identified, included in the Project Plan, and implemented?		
8	<b>Quality Assurance</b>		
8.1	Is there a Quality Assurance Plan documented and filed?		
8.2	Are the quality assurance functions and related roles and responsibilities clearly defined?		
8.3	Are there completion/verification criteria defined for each task producing an output?		
8.4	Is there a process (test plans, inspections, reviews) defined for verifying outputs for each task?		
8.5	Will tasks be marked "complete" only after QA has been successfully completed?		
8.6	Will there be a formal process for submitting, logging, tracking, and reporting items undergoing QA throughout the submit-test-rework-resubmit-retest cycle?		
8.7	Will statistics related to QA be collected, trends analyzed, and problems raised as issues?		
8.8	Will the QA related information be reported regularly as part of the Status Reporting mechanisms?		
8.9	Has a method and process for requirement tracking been developed?		

**B SIGNATURES**

*The signatures of the people below relay an understanding that the key elements within the Planning Phase section are complete and the project team is ready to transition to the Execution Phase.*

Name/Title	Signature	Date