Project Management Plan - Audit

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|  | **Meets or Exceeds Standard (A)** | **Nearly Meets Standard (B)** | **Does not Meet Standard  (C)** | **Feedback** |
| **Team charter** | 1-2 page team charter with clear identification of at least the following key components: team purpose, team roles and team values | team charter with identification of some of the key components and/or some key components are discussed but lack clarity | Insufficient identification of key components and/or key components lack clarity | Great Team charter, clear and concise, highlights key areas well. Excellent.  Rating = A |
| **Evaluation Rubric (Optional)** | Comprehensive rubric that includes a wide range of expected behaviours, has unambiguous measures, reflects the team values identified in the team charter, and is user-friendly in terms of formatting | Rubric displays a few of the following: insufficient range of expected behaviours, ambiguous measures, loose connection to the team charter, and/or hard to use | Rubric displays the problems identified in previous category but to a greater extent | Perhaps Opt out of this one? |
| **Organizational Assessment**  **(Optional)** | The assessment includes detailed descriptions of the structure, culture and key people in the organization. I feel that I know this organization. Clear and thoughtful assessment of the impact of the organization on the project. Appropriate project life-cycle is selected and justified. | The assessment includes description of some key components of the organization and/or the descriptions are not complete. Assessment of the impact of organization on the project and/or identification and justification of project life-cycle is insufficient. | Many key components are missing and/or lacking in their depth and clarity | Perhaps opt out of this one? |
| **Project Charter (Mandatory)** | All components are complete and presented clearly yet concisely – just the right amount of detail. I am left with no uncertainty. Signed off by team and sponsor. | Most components are complete and/or presented clearly yet concisely. Signed off by team and sponsor | Few components are complete and/or presented clearly and concisely. May not be signed off by team and sponsor | The charter is clear and adequately provides a mandate for the project.  Rating = A |
| **Stakeholder Analysis**  **(Mandatory)** | All components are complete and presented clearly yet concisely. Shows depth of thought in developing the stakeholder list, sound analysis in stakeholder prioritization, and rational judgment in the engagement and responsibility of stakeholders | Most components are complete and/or presented clearly yet concisely. Some concerns with the depth of thought or analysis. | Few components are complete and/or presented clearly and concisely. Major concerns with the depth of thought or analysis. | The stakeholder analysis works well for the project. The template is comprehensive enough to display the analysis and identify the interests of the small group of stakeholders involved. It is good that the wider connected stakeholder groups are identified and understandable that their interest levels are low.  Rating = A |
| **Communication Plan**  **(Mandatory)** | Communication matrix is complete, comprehensive and easy to follow and interpret. Sample meeting documentation is present; all components are complete and clear. | Communication matrix is complete, but is lacking in some important details and/or raises some questions in interpretation. Sample meeting documentation is present, but is missing some components and/or lacks some clarity. | Communication matrix is not complete, is lacking in significant details and/or is difficult to interpret. Sample meeting documentation is incomplete and/or unclear. | The communication plan is adequate covering the needs of the project and makes sense. It is clear and concise.  Rating = A |
| **Requirements**  **(Mandatory)** | Requirements are clear and thoughtful connection between business need, project requirement, stakeholders and priority. | RTM is lacking in some clarity and/or depth of thought with regard to its four dimensions | Requirements Traceability Matrix (RTM) is absent and/or is seriously lacking in clarity and/or depth of thought with regard to its four dimensions. | Your requirements align with your acceptance criteria. In this case I am ok if you rename your acceptance criteria document requirements and acceptance criteria.  Rating = A |
| **WBS/ Scope Plan (Mandatory)** | Scope builds from the Charter, contains all components, and is clear and concise. WBS is in the proper format, is comprehensive for the project (i.e., lists all tasks), and cannot be further decomposed. | Scope has some minor omissions and/or lack of clarity. WBS is in the proper format but the task list may be missing items and/or not decomposed fully. | Scope has major omissions and/or lack of clarity. WBS is not in a proper format, and/or lack sufficient task detail and/or decomposition. | The WBS is nice and clear and concise covering the work packages of the project and breaking them down to an adequate level for the project.  Rating = A |
| **Resourcing / HR Plan**  **(Mandatory)** | Resource roles are present and clear for all required team members. Resource assignments are indicated compared to work requirements. | Some details of resource planning are missing and/or lacking in sufficient detail or readability. | Resource requirements for the project have not be defined or only barely represented. | Whereabouts is this? I think it is incorporated into the Team Charter? If that is the case label the Team Charter appropriately (I.e. Team Charter & Resource plan)... It describes the different resources for the project, roles and responsibilities. The resource plan might typically describe the roles and time required for each role that connects to the estimations (sometimes people are named but often not at the start)  Rating = A |
| **Risk Plan**  **(Mandatory)** | Risk register includes at least three risks for each success measure/deliverable. Sound judgment and recommended technique was used to classify risks and a thoughtful and realistic contingency plan is outlined for each. | Risk register includes at least three risks for each success measure/deliverable. Risk classification lacks some clarity, detail and/or judgment. Contingency planning was not completed for all major risks and/or lacked thoughtfulness. | Risk register includes fewer than three risks and/or the classification of each risk shows insufficient technique and judgment and/or the contingency planning is incomplete or unrealistic. | The risk register template is adequate. The three risks mentioned are generic project risks (or impacts) and responses. Therefore, they could be said about any project. Project management is designed to mitigate these kinds of risks/impacts.  One risk that applies in your specific situation/context was: Given that the root cause of the problem of staff retention is unclear and a permanent solution to the problem may take time to implement. There is a risk that the project team will not be able to identify solutions and implement them within the timescale of the project. This impacts the scope of the project.  The response plan would be a contingency to reduce the scope of the project to focus on recommendations only, after the initial analysis.  I would suggest adding that risk to the risk plan.  Rating = B |
| **Acceptance Criteria/Quality Plan**  **(Mandatory)** | Quality Plan includes all aspects that are relevant to the project at hand (i.e. governance standards and completeness criteria for deliverables). This plan shows depth of thought and is clear and concise. | Quality Plan includes all aspects that are relevant to the project at hand (i.e. governance standards and completeness criteria for deliverables). Most aspects of the plan show depth of thought and are clear and concise. | Quality Plan is lacking in important considerations relevant to the project and/or it does not display a thoughtful process to arrive at quality conclusions. | Acceptance criteria shared with sponsor are clear and agreed to!! Excellent.  Rating = A |
| **Budget (if applicable)**  **(Optional)** | A clear and comprehensive budget is present if required for the project. Written report includes a detailed and thoughtful account of assumptions and constraints behind the budget as well, a confidence estimate and how risks were included. | A budget is present if required for the project. Written report includes an account of assumptions and constraints behind the budget as well, a confidence estimate and how risks were included. | A budget is required for the project, but it si missing or incomplete. Written report on the assumptions and constraints, confidence estimate and inclusion of risks is incomplete and/or insufficient in detail and depth of thought. | Not Applicable |
| **Procurement (if applicable)**  **(Optional)** | Sample RFI and selection criteria are present, if applicable, user-friendly and relevant to the project. Written report includes identification of the appropriate contracts to use and a thoughtful assessment of the challenges and benefits to partnering.  Where procurement is not necessary, a report clearly justifies this decision. | Sample RFI and selection criteria are present, if applicable, and for the most part user-friendly and relevant to the project. Written report includes some identification of the appropriate contracts to use and an assessment of the challenges/benefits to partnering.  Where procurement is not necessary, a report justifies this decision. | Aspects of the RFI, selection criteria, proposed contracts and challenges/benefits are incomplete or insufficient in detail and thought.  Where procurement is not necessary there is limited discussion of why this is so. | Not Applicable |
| **Issue Log, or other Documented Project Progress**  **(Mandatory)** | As applicable an appendix includes documentation to illustrate project progress (i.e., issue log, meeting agenda/minutes, change requests, changed risk register, cost tracking, communication flow, etc.) | Some documentation is provided to show project progress | No documentation is provided to show project progress. | Log looks good and addresses issues as they materialsed. Issue 1 is the result of the risk I mentioned before materialising. Risks that happen become issues. Good stuff !  Rating = A |
| **Project Assessment**  **(Mandatory)** | An applicable and comprehensive project close-out checklist is included and completed. Thoughtful assessment of project success to date including lessons learned and sponsor/stakeholder feedback. | A project close-out checklist is included and completed. Assessment of project success to date which for the most part includes lessons learned and sponsor/stakeholder feedback. | Aspects of project close-out checklist, project assessment to date and/or lessons learned are missing and/or incomplete. | You can start a draft of this early whenever you are ready |
| **Transition Plan (if applicable)**  **(Optional)** | Transition plan clearly and concisely explains the provided documentation for use by the sponsor in lay-terms. I feel like I could enact this plan with no further ground work as a result. | Transition plan explains the provided documentation for use by the sponsor. I am fairly confident I could enact this plan with no further ground work. | Transition plan does not clearly explain all or parts of the documentation for use by the sponsor. I am not confident that I could enact this plan with no further ground work. | I think you can opt out of this having had agreement from Donny on requriements |
| **Mechanics** | No errors in punctuation, capitalization and spelling. | Almost no errors in punctuation, capitalization and spelling. | Many errors in punctuation, capitalization and spelling. | Rating = A |
| **Usage** | No errors in sentence structure and word usage. | Almost no errors in sentence structure and word usage. | Many errors in sentence structure and word usage. | Rating = A |

Schedule:- I like your straight forward gantt chart it describes the work well. The one thing to tweak is the crtiical path. There can be only one critical path, it is the longest way through the project . This is adequate for the project. Rating = A

Comments:

Based on a holistic overview of the above your final mark is: