

# PROJECT DEFINITION CHECKLIST

**A** -- Attended to (yes, OK, answer(s) known, done, etc.)

**N** -- Not attended to (not applicable, not needed, little or no risk, etc.)

## **A**   **N**   **OBJECTIVES**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 1. What is the process or system to be studied?                           |
| <input type="checkbox"/> | <input type="checkbox"/> | 2. Who requested the study?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 3. Why is it to be studied?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 4. Is there one overriding objective?                                     |
| <input type="checkbox"/> | <input type="checkbox"/> | 5. Are there several objectives?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 6. Are the objectives in writing?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 7. Are they written specifically enough that we feel we can achieve them? |
| <input type="checkbox"/> | <input type="checkbox"/> | 8. Has management agreed to these objectives in writing?                  |

## **SCOPE**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 9. What are the major items involved?                                 |
| <input type="checkbox"/> | <input type="checkbox"/> | 10. Where in the flow of these items will we begin the study?         |
| <input type="checkbox"/> | <input type="checkbox"/> | 11. Where will we end it?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 12. What areas (sections, units, departments, etc.) will be affected? |
| <input type="checkbox"/> | <input type="checkbox"/> | 13. Have the managers and supervisors of these areas been informed?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 14. Are they in agreement?  |

## **TEAM MEMBER SELECTION**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | 15. Have the area managers/supervisors agreed to be represented on the project team? |
| <input type="checkbox"/> | <input type="checkbox"/> | 16. Have they agreed to an approximate number of hours per week for meetings?        |
| <input type="checkbox"/> | <input type="checkbox"/> | 17. Have representatives been chosen for each area?                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | 18. Do the representatives have current experience?                                  |
| <input type="checkbox"/> | <input type="checkbox"/> | 19. Are they respected by the other people in their work areas?                      |
| <input type="checkbox"/> | <input type="checkbox"/> | 20. Have they been informed?   |
| <input type="checkbox"/> | <input type="checkbox"/> | 21. Are they in agreement to participate?  |

## **TEAM FORMATION**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 22. Have the team members been given training in project work?          |
| <input type="checkbox"/> | <input type="checkbox"/> | 23. Have they been trained in the techniques to be used on the project? |
| <input type="checkbox"/> | <input type="checkbox"/> | 24. Has a coordinator been assigned?                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | 25. Have the coordinator's duties been made clear?                      |
| <input type="checkbox"/> | <input type="checkbox"/> | 26. Has a team leader been chosen?                                      |
| <input type="checkbox"/> | <input type="checkbox"/> | 27. Have the team leader's duties been made clear?                      |
| <input type="checkbox"/> | <input type="checkbox"/> | 28. Has a team recorder been chosen?                                    |
| <input type="checkbox"/> | <input type="checkbox"/> | 29. Have the team recorder's duties been made clear?                    |

## **TECHNICAL ASSISTANCE**

- |                          |                          |   |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | 30. Will this project involve any technical specialties? (i.e. electronic form design, computer programming, communications equipment, barcoding, micrographics, retrieval systems, etc.) |
| <input type="checkbox"/> | <input type="checkbox"/> | 31. Are appropriate technical specialists available?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 32. Have they been assigned to the team?  |
| <input type="checkbox"/> | <input type="checkbox"/> | 33. Is the extent of their involvement clear and agreed upon?   |