Wichita State University

Project Audit Checklist

Wichita State University Information Technology Services department has been doing projects for many years. About January, 2016, the ITS department started adding structure, definitions, processes and procedures to our project management. For the most part, these structures, processes and procedures have been widely adopted by ITS department and we have made strides in our effort to make project management tools available for the whole campus.

This one-page document is meant as an aid to self-check your project. In it, you will find questions and high level areas on the procedures, processes and structure that every project needs to be successful. It is our hope that every project manager on every project will run this self-audit checklist to see if their project is in compliance with ITS and WSU guidelines. If there are any questions on any step in this document, please feel free to contact the Director of PMO, Anita Barrett – 316-978-7575 or Project Management, Warren Glore – 316-978-7574

Project Audit Checklist

Does the project have a Project Charter?				
A project charter should include all stakeholders, project overview and objectives, high level timeline, estimated hours and costs, scored to Wichita State University goals, key deliverables, success factors, constraints, risks and known issues. This may be done in a word template or worked in TDX which is required for ITS. To create a project charter out of TDX, go to the project/workspace area of TeamDynamix. Find the Project in the left column, Click on Project Details. Highlight and copy the entire right column starting with the Project name. Paste all information into a blank word document. Save the document on your desktop using the following naming convention: "Project Charter <*project name*> <*today's date*>". Upload the charter to the project briefcase – this can be done at any time but strongly requested at close out.				
Does the project have a valid Project Charter?	Yes	◯	No	◯

Does the project have a project plan/schedule containing enough tasks to complete the project				
Project plan/schedule should be located in the plans section of each project. Depending on the type of project, the plan/schedule may be a waterfall plan or an adaptive approach using a card wall. There should be enough tasks identified within the project plan/schedule to complete the entire project within the time limit of the project. It should contain all the work needed with team members assigned.				
Does the project have a valid Project Plan/Schedule	Yes	◯	No	◯

Does the project have a minimum of one project requirements document in the briefcase				
Project requirements document contains the detailed requirements for the project. This document should include all information from the customer(s) that would define What is needed. Add a glossary for any uncommon words, and define the Who needs what (Stakeholders and Sponsors), What (In detail, what does the customer need from the project), why (define what the end project would do and why they need this project – i.e. Business process improvement, Regulatory Requirements, Cost Savings, Upgrade to stay current, etc.)				
Does the project have a valid Project Requirements Document?	Yes	◯	No	◯

Does the project have a Risk Matrix				
Project Risk Matrix outline what could go wrong to slow or stop the project from finishing. This document should include any potential risks the project may face to include, but not limited to, resources (people), assets (equipment), training (is the assigned resources required to have training), or any other item that could affect the project deliverables or that could possibly delay the project. The matrix should include the impact and severity if the risk happened and should include the steps/actions that the team will take. Sample excel file is available in TDX project briefcase but can also be filled out by adding the risks to the project Risks section. To create a Risk Matrix out of TDX, go to the project/workspace area of TeamDynamix. Find the Project in the left column, click on Risks Register.				
Does the project have a Risk Matrix?	Yes	◯	No	◯

Does the project have a Lessons Learned Document				
The lessons learned document should be in the project briefcase. This document may or may not be filled out at the time of the audit. If it is not filled out is there a template in the briefcase and is there a task in the project plan/schedule to complete the lessons learned prior to close out of the project.				
Does the project have a lessons learned document?	Yes	◯	No	◯

Is the Project Manager Conducting Team Meetings on a Regular Basis and are These Team Meetings Documented				
Team meetings are a very important integral part of any project. While the exact format, duration and scheduling of the team meetings can vary a great deal between different projects' needs, each team meeting should as a minimum include how the project is progressing by reviewing the current schedule, address any issues and placing them in the Issues Log, and nice to have: generate meeting minutes that will be kept in the project briefcase.				
Does the Team Conduct and Document Team Meetings?	Yes	◯	No	◯

Is the Project Leadership using and maintaining a Project Issue Log				
The Issue Log should be actively maintained and stored in the project issue section along the left edge of the project tab. An issue log is a very important team document that is used to track and control all issues that HAVE occurred in any phase of the project. As a minimum, each issue will have an issue number, priority, who is responsible for the issue, when the issue was discovered, estimated issue completion date and the resolution to the issue.				
Does the Team Use and Maintain an Active Issue Log?	Yes	◯	No	◯