

Initiation Phase Checklist

Project Name: _____ Date: _____

The Initiation Phase clarifies the scope and business case for the project, and identifies the resources and planning issues associated with conducting the project.

This checklist can be completed at any point in the project, particularly at the end of the Initiation Phase, or else any major checkpoint where significant replanning activity has been completed. The questions presume that project organization is taking place on the project, and that some form of Project Charter/Plan is being produced, even if informally.

		<i>Score should range from 0 (No) to 10 (Yes).</i>	Score (0-10)
1.	Has the project identified and clarified the scope of the intended effort to a sufficient level of detail to identify any overlap with other projects and project high level resource needs?		
2.	Has the project identified all intended project stakeholders, both customer and suppliers, and involved them in the initial planning of all efforts?		
3.	Has initiation determined the funding strategy for the project and negotiated with the organization to obtain the necessary funding for the project when initiated?		
4.	Has the project developed a project plan that includes detail requirements activity plans, and at least high-level activities through to project completion?		
5.	Has the project determined that all system components needed are available, and that such availability doesn't interfere with any other active projects?		
6.	Has the project developed a project plan sufficient to assure conformance to all objectives of the anticipated scope, without interfering with other projects already underway?		
7.	Has the project determined that the project leader and staff can handle addition of this project to their workload without creating an excessive burden?		
8.	Has the project evaluated the risk levels associated with the project in order to determine the tolerances that can be carried on this project before requiring management action?		
9.	Has the project assessed the priority of the work effort, taking into account any known or anticipated dependencies between this and other projects?		
10.	Has the projects clearly identified and documented any known cost, schedule, resource, or standards constraints on the project?		
<i>Total Score:</i>			

Notes: