

**Directions:** Use this check list to ensure you have covered important steps in launching your performance improvement project. This tool is intended to be used by the person asked to lead a PIP or any project where a team has been formed. Use this check list to make sure you have everything you need in place when you start a project. Ensuring you have these steps in place can help you save time and confusion down the road.

**Project Name:**

### **Project Stakeholders and Team Members**

- The team has received a project charter that has been approved by the leadership.
- The project team has been assembled and roles and responsibilities have been assigned.
- The project charter is understood and accepted by all project team members.
- The project team understands how the project fits with the overall goals of the organization.
- Each project team member understands how his/her assignment fits into the overall project.
- The project and its goals have been communicated to stakeholders outside of the project team, as needed (e.g., residents and families, staff, board of directors, owners).

### **Project Resources**

- Financial support for the project has been obtained.
- A project budget has been established.
- Staff time to work on the project has been allocated.
- Material resources required for the project have been identified and secured.

### **Project Process**

- A detailed timeline and work plan have been created.
- Training needs have been identified and training has been conducted.
- A schedule for regular project team meetings has been set.
- Indicators/measures have been established to monitor project goals (see Goal Setting Worksheet).
- The format and frequency for documenting project status has been defined.
- The format, frequency, and audiences for communicating project status has been defined.
- A process to identify issues that come up during this project is established (e.g., unintended consequences, new opportunities for process changes, surprises).
- The location for storing all project documents, and processes for file naming conventions and version control has been established.
- The time for project kickoff has been identified and any related activity required (e.g., announcement, meeting, event) has been planned.