

Calibri (Body) 14 A A

B I U

Alignment Number

Conditional Formatting

Format as Table

Cell Styles

Cells Editing

A1 Proposed Rules for "Project Health Assessment"

| A | | B | C | D | E |
|--|---|---|------------------------------------|--|---|
| Proposed Rules for "Project Health Assessment" | | | | | |
| Area | Test | | Points Deducted (from max of 100%) | | |
| Scheduling | Project should have a valid schedule (Initiated from Charter Key Activities) | | -10% | | |
| | - Schedule progress should be updated on a monthly basis | | -2% | <= only tested if project has valid Schedule | |
| | - Project Schedule should be baselined | | -2% | <= only tested if project has valid Schedule | |
| Resource Management | Active project should have resources in the resource plan | | -15% | | |
| | - Resource Plan dates should match schedule Start and End dates (+/- 1 month) | | -5% | <= only tested if project has resource plan | |
| | - Resource plan should be updated on a monthly basis | | -2% | <= only tested if project has resource plan | |
| | - "Calculate From" field is set to Resource Plan | | -2% | <= only tested if project has resource plan | |
| Status Updates | - No generic resources for Active projects | | -2% | <= only tested if project has resource plan | |
| | Recent Accomplishments & Upcoming New Activities fields should be updated each month | | -15% | | |
| | Active Projects must have "Planned Completion Date" - must be entered by Portfolio Manager | | -5% | | |
| | No Project Status Indicators should say "Not Assessed" | | -5% | | |
| Other Data Quality | If "Overall Risk" is Red or Yellow, there should be an "Issue Impact Mitigation" listed. | | -2% | | |
| | "Overall Risk" should be Red if People, Intent, or Delivery is Red | | -2% | | |
| | Active projects must have a Project Charter | | -15% | | |
| | Problem and Goal Statement should be entered for Active Projects | | -5% | | |
| | Business Outcome Goal Benefit should be entered for Active Projects | | -5% | | |
| | Is Project < 100% Complete and Estd Finish Date in the past? | | -2% | | |
| | Is Project 100% Complete and Project Status not "Complete"? | | -2% | | |
| | Is Project Status = "Complete", but Actual Completion Date is not filled in? | | -2% | | |
| | Is Project Status <= "Complete" and Actual Completion Date is filled in? | | -2% | | |
| | Governing Body must not be "Not Assessed" | | -2% | | |
| Training | Sponsor must not be "Not Assessed" | | -2% | | |
| | Project Category must not be "Not Assessed" | | -2% | | |
| Prioritization | Est % Complete must not be "NA" | | -2% | | |
| | Project Leader should have gone through PM 101 (3-day) training | | -2% | | |
| Capital | Project Leader should have gone through PL Intro (1-day) training | | -2% | | |
| | Active projects should not have "Not Selected" as the Selection Decision on Governance page | | -5% | | |
| Capital | Is a project in Proposed Status with Actual Spend? | | -10% | only for Capital Projects | |
| | Capital Costs should be updated each month. | | -5% | only for Capital Projects | |