**Project Management Evaluation   
Review Report and Worksheet Templates**

*Project Management Evaluation Reviews* are formal reviews intended to uncover issues, concerns or challenges that may impact the quality or value results if changes are not made and facilitates resolution for what needs to be improved for successful completion.

***Who completes PMERs?***

The PMER process and templates can be used by the project team as a proactive self-check on how the project is being managed or by the Project Management Office in the interest of advancing continuous improvement of project management capabilities. The worksheet allows for an overall score that can be tracked by the PMO to measure project performance in relation to project management practices being followed.

***When should PMERs be completed?***

The PMER process can be used as a health check at specific points in the project lifecycle; however, frequency may depend on factors such as project size, duration and importance, as well as evaluator capacity to complete a quality reviews. For example, PMERs may be completed at the start of the project to assess readiness to proceed, during execution to assess performance relative to plans and at the end of the project during closeout to capture lessons learned – with each re-evaluation the worksheet is updated and score revised to reflect current performance.

***What is measured?***

The PMER scores overall performance based on assessment results of key attributes. Typically, performance is evaluated based on project relevancy, efficiency and effectiveness to achieve objectives and likelihood the project will realize and sustain expected outcomes (benefits). This example template focuses on project management practices but also includes the ability to rate partner (i.e., third party) contributions. By comparing performance to compliance to established process, the PMO can assess the effectiveness of implemented policies, procedures and templates, etc. Compliance can either be incorporated into the score of each attribute or separately done against a checklist.

***What are the main steps of evaluation?***

1. Prepare evaluation – Meet with the project manager to discuss how the project will be assessed, to discuss the location of all available project documents to be reviewed; and agree on which stakeholders should be contacted and by how (survey, interview, meeting).
2. Evaluate project – Review all available documents, conduct interviews, collect questionnaires or conduct feedback workshop. Compile and analyze information using review worksheet as a guide. Draft a report to document assessment, key findings and recommended actions. It is recommended that the project team self-evaluate project performance to facilitate healthy discussion with evaluator(s).
3. Present Report – Present findings to the project manager and address any concerns or discrepancies. Ensure all recommendations have assigned responsibility and timing. Present final results and obtain signoff from project manager, sponsor and PMO as their acknowledgment of the results and agreement to support resolution of issues.
4. Review Evaluation and Follow-up Tracking– PMOs should keep a log of project reviews in progress and completed to track scores, capture organizational lessons learned and follow up on completion of resolutions.

Template

**Project Management Evaluation Review Report**

*Revise attributes and templates as needed to fit organization's practices*

**Overview**

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Title:** | Recognized or registered title | | |
| **Description:** | Short description of project purpose | | |
| **Sponsor:** |  | **Manager:** |  |
| **Project Stage:** |  | **Project Class:** |  |
| **Evaluator:** |  | **Review Date:** |  |
| **Doc. Version:** |  | **Previous Reviews:** |  |

***Background***

Briefly list history of the project relevant for the review; i.e., key milestones achieved to date.

***Results of Previous Reviews***

List recommendations and status

***Review Process***

Briefly describe objectives and scope relative to type of review. For example:

* Validate overall program definition and management plans
* Review performance of the just completed phase, capture lessons learned, assess quality of outcomes (as inputs to next phase)
* Ensure planned work supports realization of the benefits outlined in the charter
* Review and follow up on any issues or deficiencies identified in a previous review

Describe how review was conducted including list of documents reviewed and stakeholders who provided input.

**Scorecard and Summary of Key Findings**

| **Attribute** | **Score** | **Comment** |
| --- | --- | --- |
| 1. **Project is defined well and objectives relevant** |  | Highlight notable strengths or weaknesses |
| 1. **Planning is sufficient to achieve objectives** |  |  |
| 1. **Project is performing well and is likely to achieve objectives** |  |  |
| 1. **Partner contributors managed well** |  | If applicable |
| 1. **Project is likely to have sustainable outcomes** |  |  |
| **Overall Performance Score:** |  |  |
| **Process Compliancy Score:** |  | Optional |

Recommendation and Action Plan

|  |  |  |
| --- | --- | --- |
| **Recommendation** | **Action Proposed** | **Status** |
|  | Include timing and owner |  |

**Report Acknowledgement**

The undersigned acknowledge they have reviewed the *Project Management Evaluation Review Report* and agree with the results and recommendations.

| **Role** | **Name / Unit** | **Signature** | **Date** |
| --- | --- | --- | --- |
| **Manager:** |  |  |  |
| **Sponsor:** |  |  |  |
| **PMO:** |  |  |  |
| **Other:** |  |  |  |

**Attachment A – Detailed Assessment Worksheet**

Insert detailed table

**Other Attachments**

Include schedules for other relative documents such as questionnaires, survey results, review meeting minutes, etc.

**Template**

**Project Management Evaluation Worksheet**

Overview

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Title:** | Recognized or registered title | | |
| **Manager:** |  | **Sponsor:** |  |
| **Project Stage** |  | **Project Class:** |  |
| **Evaluator:** |  | **Worksheet Version:** |  |
| **Documents Reviewed:** |  | **Meeting Date:** |  |

*Revise, add or remove attributes and associated indicators and quality standards as appropriate to your organization. Once set, the attributes should stay constant so that measured performance trends can be assessed over time; however the attributes' indicators and quality standards can be can be updated as organization's project management maturity evolves.*

**Attribute 1: Project is defined well and objectives (continues to be) relevant**

| **Indicators** | **Quality Standards** | **Score** | **Comments** |
| --- | --- | --- | --- |
| * 1. Appropriateness of objectives | * + 1. Objectives are specific measurable, clear and realistic |  |  |
| * + 1. Objectives are consistent with unit business plan and corporate goals |  |  |
| * + 1. Beneficiaries’ needs are reflected in objectives |  |  |
|  | **Indicator Total:** |  | Total scores against quality standard |
| * 1. Stakeholders are involved and committed | * + 1. Stakeholders were identified, interest and impact assessed |  |  |
| * + 1. The appropriate stakeholders were involved in defining objectives and requirements |  |  |
| * + 1. Stakeholders were informed and understand purpose, objective, approach (kick off) |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Project requirements and scope well described and consistent to objectives | * + 1. Project requirements documented and traceability established |  |  |
| * + 1. Scope is described in terms of high level work phases and key deliverables |  |  |
| * + 1. Deliverables are described in appropriate detail |  |  |
| * + 1. Work Break Down Structure is documented |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Project governance structure has been defined | * + 1. Project Steering Committee established (if applicable) |  |  |
| * + 1. Project Sponsor is identified and responsibilities understood |  |  |
| * + 1. Authority levels and reporting lines are clearly understood |  |  |
|  | **Indicator Total:** |  |  |
|  | **Overall for Attribute 1:** |  | Total indicator scores; transfer this score to report scorecard summary |

**Attribute 2: Planning is sufficient to achieve objectives**

| **Indicators** | **Quality Standards** | **Score** | **Comments** |
| --- | --- | --- | --- |
| * 1. Comprehensive overview of how the project will be managed and executed | * + 1. Project management plan is integrated and includes all relevant subsidiary plans (may be collection of documents) |  |  |
| * + 1. Project schedule covers entire project lifecycle with level of detail appropriate for planning horizon |  |  |
| * + 1. Project management plan is accessible by all team members |  |  |
| * + 1. Project management plan updated regularly with document control |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Timeline, budget and staffing plan sufficient to achieve the objectives | * + 1. Timeline takes into consideration resource availability schedules and other planned events; as well as non-planned events |  |  |
| * + 1. Budget covers all major components needed to implement project |  |  |
| * + 1. Resource estimates documented and peer reviewed |  |  |
| * + 1. Project has sufficient resources with right skills to complete the work |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Comprehensive Risk assessment completed | * + 1. Team members involved in regular risk identification, assessment and planning |  |  |
|  | **Indicator Total:** |  |  |
|  | **Overall for Attribute 2:** |  |  |

**Attribute 3: Project is performing well and likely to achieve objectives**

| **Indicators** | **Quality Standards** | **Score** | **Comments** |
| --- | --- | --- | --- |
| * 1. Human Resources being used effectively | * + 1. Resources skills were taken into consideration, training provided if needed |  |  |
| * + 1. Responsibilities and expectations were clearly defined for resource roles |  |  |
| * + 1. Resource utilization was managed |  |  |
| * + 1. Team members know who to contact if there is a delay or a problem |  |  |
| * + 1. Team members are consistently completing deliverables in required timeframe |  |  |
| * + 1. Conflicts between team members are resolved effectively |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Project progress is being reported at right level to right stakeholders | * + 1. Progress being assessed and reported at team level on regular periodic cycle (weekly or daily) |  |  |
| * + 1. Progress being reported to Project Steering Committee on regular periodic or event driven basis |  |  |
| * + 1. Other stakeholders outside of the core project team are being kept informed of progress |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Performance is being monitored and controlled against schedule, scope, cost and quality measures. | * + 1. Decisions about schedule or scope changes involve the right people |  |  |
| * + 1. Changes in scope, schedule or budget are evaluated and documented |  |  |
| * + 1. Project risk, change and issue log exists |  |  |
| * + 1. Deliverables and end product tested using appropriate test audience and information |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Stakeholders are committed and expectations are being managed | * + 1. Stakeholders concerns are proactively being addressed |  |  |
| * + 1. Stakeholder assessment grid is maintained |  |  |
| * + 1. Issues are resolved effectively by the right people and in a timely manner |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Project is progressing in achieving objectives and milestones (and potentially already realizing benefits) | * + 1. Activities and Deliverables are being completed according to schedule, budget and quality standards |  |  |
| * + 1. Deliverables acceptance is appropriately documented |  |  |
| * + 1. Realistic overall assessment indicated the project is likely to achieve its objectives |  |  |
|  | **Indicator Total:** |  |  |
|  | **Overall for Attribute 3:** |  |  |

**Attribute 4: Partner contributors managed well (if applicable)**

| **Indicators** | **Quality Standards** | **Score** | **Comments** |
| --- | --- | --- | --- |
| * 1. Vendor evaluation process sound and in accordance to corporate processes | * + 1. Selection criteria defined and documented |  |  |
| * + 1. Evaluation members representatives of target group |  |  |
| * + 1. Evaluation members adequately informed of process |  |  |
| * + 1. Follows policies and procedures according to Purchasing Support |  |  |
| * + 1. Contract scope of services is clear, concise and consistent with project objectives and plan. |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Contracts effectively managed | * + 1. Contract basis of payment are clear and consistent with project objectives and plan. |  |  |
| * + 1. Reporting structure and process established |  |  |
| * + 1. Contract deliverables are achieved and value for money obtained |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Costs monitored and reported | * + 1. Consultants’ expenditures are accurately reported, tracked and payments made in accordance with terms of contract |  |  |
|  | **Indicator Total:** |  |  |
|  | **Overall for Attribute 4:** |  |  |

**Attribute 5: Project is likely to have sustainable outcomes**

| **Indicators** | **Quality Standards** | **Score** | **Comments** |
| --- | --- | --- | --- |
| * 1. Project progressing in achieving objectives | * + 1. Project is likely to be successfully implemented and to achieve defined objectives as defined in the charter. |  |  |
| * + 1. Benefits not attained within the course of the project have approved documented plans for realizing remaining project benefits |  |  |
|  | **Indicator Total:** |  |  |
| * 1. Project likely to realize and maintain benefits beyond the life of the project | * + 1. Beneficiaries likely to have sufficient knowledge, skills and resources to maintain benefits after project completed |  |  |
| * + 1. Solution is likely to financially supported by organization and lifecycle budget maintained |  |  |
| * + 1. Support resources likely to have sufficient knowledge, skills to maintain solution |  |  |
|  | **Indicator Total:** |  |  |
|  | **Overall for Attribute 5:** |  |  |

**Overall Project Score**

| **Attribute** | **Score** | **Comments** |
| --- | --- | --- |
| 1. **Project is defined well and objectives relevant** |  |  |
| 1. **Planning is sufficient to achieve objectives** |  |  |
| 1. **Project is performing well and likely to achieve objectives** |  |  |
| 1. **Partner contributors managed well (if applicable)** |  |  |
| 1. **Project is likely to have sustainable outcomes** |  |  |
| **Overall Project Performance Score:** |  | Average of applicable attributes |

*(Optional) Provide an overall rating on compliance to established project management policy, procedures and templates*

| **Compliance Rating** | **Score** | **Comments** |
| --- | --- | --- |
| Appropriate documentation maintained in project repository as per PMO Documentation Checklist |  |  |

**Scoring and Relevance (at time of review) Guideline**

|  |  |  |
| --- | --- | --- |
| **Score** | **Rating** | **Definition** |
| Good Practice | 5 | Demonstrates some above-normal practices (along with satisfactory practices) which are innovative and likely suitable to be incorporated in Unit standards. |
| Full Satisfactory | 4 | Satisfies all requirements. Only minor weakness in the project. |
| Satisfactory Overall | 3 | The lowest score that satisfies quality requirements. There are weaknesses as well as strengths but that the weaknesses are not severe enough to threaten the viability of the project |
| Marginally Satisfactory | 2 | Presence of serious weaknesses which require early action if project is to continue to progress. |
| Weak | 1 | Seriously deficient to project quality requirements. Problems are throughout the project and require immediate and decision action. Project may need to be put on hold. |