Checklist for starting surgery management engineering projects

Discuss and complete the following with hospital management at the start.

- ❑ Scope, it is _____
- ❑ Primary contact person(s) are _____

Logistics:

- ❑ Agreement or understanding letter defined and signed to assure clarity of the project, timeline, its objectives and scope.

- ❑ CEO &/or other execs, met, reviewed project objectives, responsibilities, contacts

- ❑ Access, badges, parking (if necessary) *

- ❑ HIPPA requirements, TB requirements *

- ❑ Office space, computer/internet access   *

- ❑ Any phonebook or directory available for people we may wish to contact? *

- ❑ Who is IT contact, source of data queries? *

- ❑ Follow up memo to hospital/department confirming project plans, objective & scope

- ❑ Schedule Kick off meeting with as many people as possible

Content items, define these at start to increase chances of success:

- ❑ Who are the stakeholders in this?

- ❑ Metrics, are we clear? What is available now?

- ❑ Report Card, is there one relevant, need to start immediately if not.

- ❑ We do ongoing status reports & meetings

- ❑ Explain early tasks; process maps, data sources

- ❑ Any prior studies, consultants, prior work?

- ❑ What documentation is available on processes, forms control?

- ❑ What/when are regular surgery staff meetings?

Date_____ by _____

   * If an internal project done with internal staff some of these items may be unnecessary but it will prove useful still to do these before the project start.