

Checklist instructions: All text in italics is instructional and will help you to complete the checklist. It should be removed from your document.

The following outlines the key activities that should be done and questions that should be answered in the Plan stage of a project. It should be reviewed before beginning the Plan stage and then periodically after that to remind you of what still needs to be done. Many project managers find it useful to have a printed copy of the checklist at their desk for easy reference.

Space is included at the bottom of the list to include any additional activities you may need to do during this stage.

Plan Stage Checklist

Activity / Question	Tool/Template	Complete?
Has the project proposal been approved?	Project Overview Statement	
Have you updated the Project Overview Statement to reflect any changes made to the project's scope in the approved proposal?	Project Overview Statement	
Have you revised the language in the Project Overview Statement so it will be clearly understood by team members and other stakeholders?	Project Overview Statement	
Have you reviewed the funder's evaluation requirements?	Evaluation Plan	
Have you created a evaluation plan that will meet all of the funder's requirements?	Evaluation Plan	
Have you identified any additional materials (e.g., surveys) that will be needed to perform the evaluation?	Evaluation Plan	
Have you calculated the cost and effort that will be needed to evaluate your project and included these in your budget and Work Breakdown Structure?	Evaluation Plan Schedule Budget	

Activity / Question	Tool/Template	Complete?
Does your evaluation plan also include activities for evaluating how the project itself was managed (e.g., how well the project met the intended scope, budget and schedule)?	Evaluation Plan	
Have you updated the activities and effort in the Work Breakdown Structure to reflect any changes made to the project's scope or budget in the approved proposal?	Schedule	
Have you turned your Work Breakdown Structure into a project schedule by adding starting and ending dates for each activity?	Schedule	
Have you included some extra time in your schedule for unanticipated issues (e.g., illness, unexpected delays, etc.)?	Schedule	
Have you updated the roles that you indicated were needed for the project to reflect any changes made to the project in the approved proposal?	Schedule Roles and Responsibilities Chart	
Have you identified individuals or organizations that can fill each of the roles?	Roles and Responsibilities Chart	
Have you discussed the project with each individual or organization as well as the specific responsibilities that they will have?		
Have you signed legal agreements with any individuals or organizations working on the project which are not already under your direction supervision?		
Have you signed team member agreements with any individuals working on the project which are already under your direct supervision?		

Activity / Question	Tool/Template	Complete?
If applicable, has a Steering Committee been formed for the project?		
If applicable, has an Advisory Committee been formed for the project?		
If applicable, has the project been discussed with each committee member as well as the specific responsibilities that they will be playing?		
If applicable, has each committee member agreed to participate in the project and perform the required responsibilities?		
Have you updated the costs in the budget to reflect any changes made to the project's scope in the approved proposal?	Budget	
Is the budget set up to allow for easy tracking of actual expenses compared to budget amounts?	Budget	
Have you used the information in the Project Overview Statement, schedule, budget and Roles and Responsibilities Chart to create a Project Charter?	Project Charter	
Has information on risk, communications and other project management activities been included in the Project Charter?	Project Charter	
Has each member of the project team reviewed the Project Charter?	Project Charter	
Have you met with the project team to ensure they understand the project's purpose, goals, scope, budget and schedule?	Project Charter	
Have you encouraged the project team to offer feedback on the Project Charter and updated it when appropriate?	Project Charter	

Activity / Question	Tool/Template	Complete?
Has the Project Charter been approved in writing by the Project Sponsor?	Project Charter	
If applicable, has the Project Charter been approved in writing by the Steering Committee?	Project Charter	