



# Participants Guide to Health Checks

---

# Preparing for a Health Check

Health checks are a simple, low impact and repeatable assurance process that is undertaken at specific times within the project or program lifecycle, they are not a Gateway or gated review. You should always remember that the Review Team Leader (RTL) and the Review Team Members (RTM), are here to help you and your project or program to succeed and deliver a better outcome. We like to think of ourselves as 'partners' rather than reviewers.



## 1 Point of contact

Your key review coordinator, will need to make contact with the RTL to discuss the Health Check and any important elements. This could include critical delivery dates or availability of team members, executives or key stakeholders.

## 2 Documents and artefacts

Depending on the type of Health Check being delivered, the RTL will ask you to correlate key documents related to the project or program, and its current position. Including any previous assurance review reports and risk-level assessments.

## 3 Senior responsible owner (SRO) or sponsor briefing

A one-on-one meeting will need to be coordinated with the RTL and the SRO/ sponsor. This allows the Health Check team to gather a better understanding of the expected assessment outcomes, and any areas that the SRO/ sponsor may feel needs additional attention.

# Starting the Health Check

Now that the RTL has been supplied with the appropriate documents and they have met with the SRO/ sponsor, the Health Check is ready to start. During this time, the review team would have reviewed and discussed the contents of the supplied documents, and overlaid their findings with needs of the SRO/ sponsor, which would have been agreed to at their initial meeting. Now we need to coordinate the Health Check, and make it happen.



## 1 Interview scheduling

The RTL will provide you with a list of key interviewees required for the Health Check. Interviews are commonly 30-45 minute in duration, held over consecutive days. Interviews are held on-site, via virtual meetings, over the phone or at an agreed alternative location.

## 2 Health check coordination

The interviews will need to be coordinated and booked into the calendars of the review team and interviewees. At this stage, additional coordination may be required, as it's not always easy to align interview times, especially with busy executives.

## 3 Confirming interviews, schedule and requirements

The RTL will confirm interview dates and times, and make direct contact with interviewees as required. Behind the scenes, the review team will be ensuring that their approach is in readiness, and that all SRO/ sponsor considerations are included in their approach.

# Managing the Health Check

We are now in the delivery phase of the Health Check. At this stage, as a result of forward planning, things should run smoothly and without too many issues. The pre-arranged interviews will be undertaken, the SRO/ sponsor will be updated daily (or as agreed), and the review team will start to build the draft Health Check report. The report is based on findings from documentation, interviews and discussions with SRO/ sponsor and program/ project leaders.

## 1 Interviews and discussions

The review team will conduct interviews, where and when agreed. Early notice should be given if interviews are changed, cancelled or if interviewees are unable to attend. All interviews are 100% confidential and any comments and feedback from interviewees, is non-attributable to the assurance report.

## 2 Clarifications and further information

The RTL is the primary point of contact, and as such, may have enquiries or clarifications that will need to be answered in a prompt manner, so the review can continue to schedule. This may include further documentation required or clarifications on feedback received during interviews.

## 3 Draft reporting

Once the review team has completed interviews, the team will head back to their base to commence developing the draft report - which will be reviewed by the SRO/ sponsor.



# Closing a Health Check

We hope that you enjoyed the Health Check assurance process, and that the assessment has provided your organisation with the assurance support that was required. Now that the draft report is complete, the review team is eagerly finishing the final Health Check report. The final report has been developed specifically for the SRO/ sponsor following assurance global best practice, and also includes an analysis of any specific areas identified.



## 1 Finalising the report

After an initial review of the draft report, the RTL will include any adjustments to the report, and issue a final report to the SRO/ sponsor. This is the final Health Check report, and it should only be shared by the SRO/ sponsor - at their sole discretion.

## 2 Returning documents and data

If you have provided the review team with any paper based documents, they should be returned to the issuer. The review team will securely destroy any digital copies of documentation supplied for the review - which supports best practice for cyber security.

## 3 Handover, closure and exit

The role of the review team is complete. The SRO/ sponsor has been de-briefed and presented with the final Health Check report, which contains recommendations which may (or may not) be adopted and actioned. You should now start planning for the next assurance review - assurance reviews should be conducted early and often.

# Participating in a Health Check

Our team is passionate about assurance and more importantly, are focused on helping programs, projects and organisations to succeed. We know first hand, the challenges and uncertainty of program and project environments, we focus on supporting people and organisations throughout the assurance process and ensure that achievements are highlighted, and that opportunities for improvements are clearly identified.



## 1 Relax

Relax and enjoy the opportunity to express your views, experiences and understanding of your program, project or business area. This is a great time to talk about what you see as being done well, and the areas that you might be concerned about.

## 2 Respond

Don't over prepare or study for an interview. Interviews are conducted in a highly confidential and relaxed environment, more of a conversation to better understand your environment. The review team will guide you through the process, and work through lines of inquiry and any clarifications.

## 3 Inform

Be open minded and honest through the interviews. We are 100% independent and our review team are only looking for the best outcomes for you and your organisation. Everything you say is in confidence and we do not use individual names or roles in reports, as we are not reviewing individuals.

## Australia's leading assurance specialists

We are an accredited best practice partner and Australia's leading portfolio, program and project assurance specialists, who continue to deliver outstanding assurance services and reviews to an extensive array of governments, agencies and organisations, across a broad range of industries.



[pmsolutions.com.au](https://pmsolutions.com.au)