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| **Project Name:** |  |
| **Prepared by:** |  |
| **Date (MM/DD/YYYY):** |  |

***Instructions:*** *The Project Transition Checklist is used to ensure that deliverables of the project will be brought to full operational status, integrated into ongoing operations and maintained in a sustainable manner.*

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|  | **Y or N** | **Comments** |
| **1. People** |  |  |
| Has there been confirmation that the staff needed to carry out Transition will be available? |  |  |
| Are Roles & Responsibilities defined for Transition? For the Operation & Maintenance phase? For example:   * primary business contact * maintenance & operations team lead(s) * key technical staff * help desk support * documentation, training and other support staff |  |  |
| Are all groups who will be involved in support and maintenance aware of their role? |  |  |
| Have all internal and external stakeholders affected by the Transition been identified/re-affirmed? |  |  |
| **2. Planning** |  |  |
| Are the objectives of Transition clear? |  |  |
| Is there a written plan for Transition? |  |  |
| Is there a list of all unresolved issues related to Transition? |  |  |
| Is there a list of all known risks related to Transition, and a plan for dealing with them? |  |  |
| Do you know what specific processes will be required for Transition to take place? For example:   * Change Management * Software update * Helpdesk (internal & external stakeholder management) * Issue resolution * Ongoing training * Ongoing data transfers or data migrations * Routine data archive * Data backup * Auditing |  |  |
| Is there a formal and approved project schedule for the Transition period? |  |  |
| Does the schedule extend far enough into the Operation & Maintenance phase to ensure effective integration into ongoing operations? |  |  |
| Are dependencies between Transition and other organizational work known and indicated on the schedule? |  |  |
| **3. Documentation** |  |  |
| Do you know what specific documentation is required for Transition to take place?  For example:   * Standards documents * Data lists * Service Level Agreement * Training documentation |  |  |
| Is the location of documentation known to those who need it? |  |  |
| Is the written Transition Plan available to the staff who will carry it out? |  |  |
| Is there agreement about who has the authority to change, copy and/or distribute documentation? |  |  |
| Are Transition-related documents readily available to the Transition team? |  |  |
| **4. Training** |  |  |
| Are the training requirements for users, operational staff, and support staff known? |  |  |
| Is there is a formal Training Plan? |  |  |
| Are the training requirements for the Operation & Maintenance phase known? |  |  |
| Is it clear who has responsibility for keeping training requirements up to date? |  |  |
| Is it clear who has responsibility for identifying those who need training (e.g. new employees, new customers, external stakeholders, anyone affected by a significant product/process change)? |  |  |
| Is it clear who is responsible for ongoing training delivery? |  |  |
| **5. Sustainability** |  |  |
| Is there or will there be a system/process in placefor identifying, tracking, and resolving problems with the operational project/process/system? |  |  |
| Is it known how user issues will be prioritized? |  |  |
| Is there agreement on how user change requests will be dealt with? |  |  |
| Is there agreement about how communication with the user community will be managed? |  |  |
| **6. Information Security** |  |  |
| Is Information Security a component of Transition? If so: |  |  |
| * Has an information security risk analysis been completed? |  |  |
| * Have all identified vulnerabilities been addressed? |  |  |
| * Are monitoring processes in place? |  |  |
| * Is it clear who has responsibility for identifying and responding to security threats? |  |  |