Project Audit Interview Checklist

conducted for

LMC - Roses' Home

Project Manager
Vince Milton

Conducted on
23 Jan 2019

Prepared by
Susan Utah

Location
9490 Broad Street
Santa Clara, CA 95050

Completed on
23 Jan 2019 02:00 PM

Score
0/0.0 - 0.00%
<table>
<thead>
<tr>
<th>Question</th>
<th>Response</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has process improvement efforts been completed before requirements efforts begin?</td>
<td>Yes</td>
<td>Contact Kath (PMO) for more details.</td>
</tr>
<tr>
<td>Has a capability assessment been conducted?</td>
<td>Yes</td>
<td>Yes, was helped by other members of PMO team, Kath and Reid.</td>
</tr>
<tr>
<td>Has an organization readiness assessment been conducted?</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Have project management standards and procedures been identified / established and documented?</td>
<td>Yes</td>
<td>All initial documents including this first draft we tried are documented. This has been developed and finally came up with the final house plan available in the PMO files.</td>
</tr>
<tr>
<td>Has the project approach and development strategy of the project been defined, documented and accepted by the appropriate stakeholders?</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Are governance roles and responsibilities documented?</td>
<td>Yes</td>
<td>All PMO officers have access to it, too. Saved on the office computer in LMC folder.</td>
</tr>
<tr>
<td>Is a PMO (Project Management Office) in place and provide oversight to the project?</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Are project team roles and responsibilities identified and documented?</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Does all project documentation reside in a common repository for easy access?</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Have all necessary approvals been obtained?</td>
<td>Yes</td>
<td></td>
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<tr>
<td>Are the project plans updated on a frequent basis?</td>
<td>Yes</td>
<td></td>
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</table>

**Project Charter**

<table>
<thead>
<tr>
<th>Project description</th>
<th>The Roses contacted one of our officers to build their vacation house in California. They requested for the project to be finished within 10 months.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project objectives</td>
<td>To construct a high-quality, custom house within 8 months at cost not to exceed $170,000.</td>
</tr>
<tr>
<td>Sample budget</td>
<td>$170,000</td>
</tr>
</tbody>
</table>
| Basic milestones    | 1. Permits approved - February 5  
2. Foundation poured - February 18  
3. Dry in, framing, sheathing, plumbing, electrical work, mechanical inspections passed - February 27  
4. Final inspection - March 2-3 |
| Stakeholders        | Broad Street Homeowners Association  
Roses family  
LMC Management & Board |
| Project sponsor(s), clients, etc. | Phil Milton  
Jane & Rob Roses  
LMC Management & Board |
| Critical success factors | Complete and updated project plans and relevant documentation  
Appropriate budget and costs  
Complete project team management & members  
Complete & functional equipment and tools  
Updated permits and approval papers  
Aligned decisions and plans of the management  
Coaching/meeting when needed  
Appropriate quality management  
Appropriate risk management |
| Success criteria    | 1. Finish at or under $170,000  
2. Project completed before 8/30/2019  
3. Complete and good requirements obtained - project scope managed  
4. All training completed before implementation - 8/30/2019 - 0 scope change requests  
5. Able to respond to stakeholders/clients query within 30 minutes |
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| Project Scope Statement                       | 1. Pouring of foundation, framing, sheathing, plumbing, electrical works and mechanical inspections  
2. Construction of living room, kitchen, family room, storage room and 3 bedrooms  
3. Basic furnishing of kitchen  
4. Painting interior and exterior finished home (white)  
5. Communication between clients, stakeholders and sponsors |         |
| Scope description                             | 1. All rooms in the house must be complete, painted with white, and kitchen furnished (according to scope)  
2. Window glasses must not be broken  
3. Stairs inside the house must not be steep (as requested by the client)  
4. Storage room (attic) must have windows letting the sunlight come in  
5. Living room must have a wooden floor  
6. Doors and windows must have complete locks and latches, no broken screws  
7. Overall house work followed the blueprint provided |         |
| Criteria for acceptance                       | 1. A finished home (2,200 square foot) composed of 3 bedrooms, a living room, a kitchen, a family room and a small storage room in the attic  
2. A finished garage, insulated and sheetrocked  
3. Kitchen appliances to include range, oven, microwave and dishwasher  
4. High-efficiency gas furnace with programmable thermostat |         |
| Project deliverables                          | 1. Roses' home will be built to the specification and design of the original blueprints provided by the customer  
2. Owner responsible for landscaping and fence works  
3. Air conditioning is not included but pre-wiring is included  
4. Refrigerator not included in the kitchen appliances to be provided  
5. Contractor reserves the right to contract out services  
6. Contractor responsible for subcontracted work  
7. Schedule/site work limited to weekdays, 8am to 5pm |         |
| Exclusions and constraints                    | 1. Clients, Jane & Rob Roses will visit every 2 months or so to review. Contact numbers also provided to LMC just in case of emergency or request for changes. |         |

LMC - Roses' Home / Vince Milton / Susan Utah / 23 Jan 2019
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<tbody>
<tr>
<td>Full Name &amp; Signature</td>
<td>Vince Milton</td>
<td>23 Jan 2019 01:59 PM</td>
</tr>
</tbody>
</table>
Appendix 1