**Assessment Checklist**

1. Has senior management been obtained in the form of funding and tasking?
2. Has an assessment leader been named to oversee the effort?
3. Have assessment objectives been defined?
4. Have the assessors been selected? (These may be either internal or external resources – e.g., consultants)
5. Has a general schedule been set? (Start and ending dates)
6. Is adequate funding approved and in place?
7. Has a resource been defined for scheduling and coordinating interviews?
8. Is there a process in place for performing the desired type of assessment?
9. Have the people to be interviewed been identified?
10. Are the interviewees accessible? (Do they have the time to participate?)
11. Do the interviewees represent a cross-section of the organization? (Different areas, roles and all levels of responsibility – from Senior Management on downward.)
12. Do assessors have access to the documents needed?
13. Has it been decided who will receive the assessment findings and recommendations?
14. Has it been determined how and when the findings and recommendations will be presented?
15. Are the findings described in an objective, non-blaming, tone?
16. Do the findings and recommendations align with the assessment objectives?
17. Are the recommendations achievable?
18. Has a prioritized action plan for implementing the recommendations been defined?
19. Does management accept the findings and recommendations?
20. Is a follow-up assessment planned for 6 to 12 months later?