



Project Management Toolkit



- **Welcome to the Project Management Toolkit:**
- These four templates are designed to be downloaded, customized, and used immediately on your projects.
- Do not get bogged down in making them perfect; use them to drive conversations, align your teams, and deliver value.

Problem Statement

Concisely describe the problem this project solves or the opportunity it capitalizes on. What is the "why" behind this effort?

- *What is the issue?*
- *What is the magnitude?*
- *When did it start?*
- *Who is impacted?*
- *Where does it occur?*
- *Why solve this now?*

Project Purpose / Justification

Explain how this project aligns with DHA strategic goals (e.g., improving readiness, enhancing healthcare delivery, lowering costs).

What is the expected Return on Investment (ROI) or value to the enterprise?

Scope

In-scope: *What is within our authorities, what are the first and last steps of the process being improved?*

Out of Scope: *What will not be addressed by the project?*

SMART Objectives

List 3-5 Specific, Measurable, Achievable, Relevant, and Time-bound goals. What are the success criteria?

Objective 1: (e.g., "Reduce average patient check-in wait times by 20% within 6 months of kiosk implementation.")

Objective 2: (e.g., "Achieve an 85% kiosk utilization rate by patients within 90 days of go-live.")

Objective 3: (e.g., "Train 100% of front-desk administrative staff on the new system before go-live.")

C2 (Control and Command)

- **Project Lead:**
- **Project Sponsor:**
- **Core Team:**
- **Key Stakeholders:**

Approval Date:

High Level Deliverables

List 3-5 High-Level Deliverables.

Deliverable 1: (e.g., "...")

Deliverable 2: (e.g., "...")

Deliverable 3: (e.g., "...")

High-Level Risks

Risk 1: (e.g., "Global supply chain issues may delay kiosk hardware delivery.")

Risk 2: (e.g., "Administrative staff may exhibit resistance to adopting the new technology.")

Risk 3:

Key Performance Indicators (Measures)	
Baseline Measures (If applicable)	Goals
Metric 1: Metric 2: Metric 3:	<i>Metric goals (add goals tied to metrics in the 'from X (baseline) to Y (goal/target) by Z (time horizon)' format.</i>



Plan of Actions & Milestones (POAM) Template



This template is best implemented in Excel or MS Project for dynamic tracking. This slide serves as a structural model.

Milestone	Task / Deliverable	Owner	Start Date	End Date	Status	% Complete
1.0	Initiate & Plan Phase	[PM Name]	[Date]	[Date]	Completed	100%
1.1	Develop & Approve Charter	[PM Name]	[Date]	[Date]	Completed	100%
1.2	Develop Project Plan & POAM	[PM Name]	[Date]	[Date]	Completed	100%
2.0	Execute Phase: Kiosk Procurement	[Logistics Lead]	[Date]	[Date]	In Progress	50%
2.1	Finalize Vendor Selection	[Logistics Lead]	[Date]	[Date]	Completed	100%
2.2	Procure & Receive Hardware	[Logistics Lead]	[Date]	[Date]	In Progress	25%
3.0	Execute Phase: IT Integration	[IT Lead]	[Date]	[Date]	Not Started	0%
3.1	Configure Network Ports	[IT Lead]	[Date]	[Date]	Not Started	0%
3.2	Integrate with MHS GENESIS API	[IT Lead]	[Date]	[Date]	Not Started	0%
...

Status Key: In Progress / On Track | Not Started | At Risk | Overdue | Completed



Risk & Issue Register Template



This template is best implemented in Excel or a SharePoint List for automated calculations and notifications.

Risk Register

ID	Risk Description	Probability (1-5)	Impact (1-5)	Score (P*I)	Mitigation Strategy	Owner	Status
R-01	Global supply chain issues delay kiosk hardware delivery by >4 weeks.	4	5	20 (High)	Identify alternative vendors and pre-order non-critical components.	[Logistics Lead]	Active
R-02	Staff resistance leads to low adoption and continued use of manual check-in.	3	4	12 (Med)	Involve staff in the planning process; develop a robust change management & training plan.	[PM Name]	Active
R-03	MHS GENESIS API update breaks integration with kiosks.	2	5	10 (Med)	Establish dedicated integration testing environment before rolling out updates.	[IT Lead]	Watching

Risk Score Key: 1-8 (Low) | 9-16 (Medium) | 17-25 (High)

Issue Log

ID	Issue Description	Date Raised	Action Plan	Owner	Status
I-01	Kiosk vendor confirmed a 3-week shipping delay for critical touchscreens.	[Date]	Expedite shipping on alternative components to shorten integration timeline.	[Logistics Lead]	In Progress

Project Status Report Template

Percent Complete:	0.0%
Total Tasks:	0
Tasks Complete:	0
Tasks Overdue:	0

Project Title:

Status Key: ● In Progress / On Track | ● Not Started | ● At Risk | ● Overdue | ● Completed

Project Lead: _____ **Overall Status:** (Green: On-Track / Amber: At Risk / Red: Off Track) _____ **As Of Date:** _____

Recent Accomplishments (Last Month/Week):

- Major completed task or milestone 1 [completion date]
- Major completed task or milestone 2 [completion date]
- Major completed task or milestone 3 [completion date]

Upcoming Accomplishments/Milestones (Next 4 Weeks):

- [Planned Date]: Upcoming critical task or milestone 1.
- [Planned Date]: Upcoming critical task or milestone 2.
- [Planned Date]: Upcoming critical task or milestone 3.

Project Plan. POAM of project milestones and key tasks.

Milestone	Task / Deliverable	Owner	Start Date	End Date	Status	% Complete
1.0	Initiate & Plan Phase	[PM Name]	[Date]	[Date]	● Completed	100%
1.1	Develop & Approve Charter	[PM Name]	[Date]	[Date]	● Completed	100%
1.2	Develop Project Plan & POAM	[PM Name]	[Date]	[Date]	● Completed	100%
2.0	Execute Phase: Kiosk Procurement	[Logistics Lead]	[Date]	[Date]	● In Progress	50%
2.1	Finalize Vendor Selection	[Logistics Lead]	[Date]	[Date]	● Completed	100%
2.2	Procure & Receive Hardware	[Logistics Lead]	[Date]	[Date]	● In Progress	25%
3.0	Execute Phase: IT Integration	[IT Lead]	[Date]	[Date]	● Not Started	0%
3.1	Configure Network Ports	[IT Lead]	[Date]	[Date]	● Not Started	0%
3.2	Integrate with MHS GENESIS API	[IT Lead]	[Date]	[Date]	● Not Started	0%

Key Performance Indicators.

KPI	Target	Actual Performance	Trend
KPI 1	100%		● ● ●
KPI 2	<5%		● ● ●
KPI 3	XX%		● ● ●

Risk and Issue Mitigation Plan. Insert top 1-3 risks requiring senior leader awareness and mitigation plans.

Date Identified	Risk/Issue Description	Risk/Issue Mitigation Plan

Decisions Required:

Include any decisions required by Project Sponsor.s