

## **HSE**

# **Complete Self-Assessment Guide**

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# About The Art of Service

The Art of Service, Business Process Architects since 2000, is dedicated to helping stakeholders achieve excellence.

Defining, designing, creating, and implementing a process to solve a stakeholders challenge or meet an objective is the most valuable role... In EVERY group, company, organization and department.

Unless you're talking a one-time, single-use project, there should be a process. Whether that process is managed and implemented by humans, AI, or a combination of the two, it needs to be designed by someone with a complex enough perspective to ask the right questions.

Someone capable of asking the right questions and step back and say, 'What are we really trying to accomplish here? And is there a different way to look at it?'

With The Art of Service's Self-Assessments, we empower people who can do just that — whether their title is marketer, entrepreneur, manager, salesperson, consultant, Business Process Manager, executive assistant, IT Manager, CIO etc... —they are the people who rule the future. They are people who watch the process as it happens, and ask the right questions to make the process work better.

**Contact us when you need any support with this Self-Assessment and any help with templates, blue-prints and examples of standard documents you might need:**

<https://theartofservice.com>  
[support@theartofservice.com](mailto:support@theartofservice.com)

## Included Resources - how to access

Included with your purchase of the book is the HSE Self-

Assessment Spreadsheet Dashboard which contains all questions and Self-Assessment areas and auto-generates insights, graphs, and project RACI planning - all with examples to get you started right away.

How? Simply send an email to  
**access@theartofservice.com**  
with this books' title in the subject to get the HSE Self  
Assessment Tool right away.

The auto reply will guide you further, you will then receive the following contents with New and Updated specific criteria:

- The latest quick edition of the book in PDF
- The latest complete edition of the book in PDF, which criteria correspond to the criteria in...
- The Self-Assessment Excel Dashboard, and...
- Example pre-filled Self-Assessment Excel Dashboard to get familiar with results generation
- In-depth specific Checklists covering the topic
- Project management checklists and templates to assist with implementation

## INCLUDES LIFETIME SELF ASSESSMENT UPDATES

Every self assessment comes with Lifetime Updates and Lifetime Free Updated Books. Lifetime Updates is an industry-first feature which allows you to receive verified self assessment updates, ensuring you always have the most accurate information at your fingertips.

Get it now- you will be glad you did - do it now, before you forget.

Send an email to **[access@theartofservice.com](mailto:access@theartofservice.com)** with this books' title in the subject to get the HSE Self Assessment Tool right away.

## Purpose of this Self-Assessment

This Self-Assessment has been developed to improve understanding of the requirements and elements of HSE, based on best practices and standards in business process architecture, design and quality management.

It is designed to allow for a rapid Self-Assessment to determine how closely existing management practices and procedures correspond to the elements of the Self-Assessment.

The criteria of requirements and elements of HSE have been rephrased in the format of a Self-Assessment questionnaire, with a seven-criterion scoring system, as explained in this document.

In this format, even with limited background knowledge of HSE, a manager can quickly review existing operations to determine how they measure up to the standards. This in turn can serve as the starting point of a 'gap analysis' to identify management tools or system elements that might usefully be implemented in the organization to help improve overall performance.

# How to use the Self-Assessment

On the following pages are a series of questions to identify to what extent your HSE initiative is complete in comparison to the requirements set in standards.

To facilitate answering the questions, there is a space in front of each question to enter a score on a scale of '1' to '5'.

1 Strongly Disagree

2 Disagree

3 Neutral

4 Agree

5 Strongly Agree

*Read the question and rate it with the following in front of mind:*

**'In my belief,  
the answer to this question is clearly defined'.**

There are two ways in which you can choose to interpret this statement;

1. how aware are you that the answer to the question is clearly defined
2. for more in-depth analysis you can choose to gather evidence and confirm the answer to the question. This obviously will take more time, most Self-Assessment users opt for the first way to interpret the question and dig deeper later on based on the outcome of the overall Self-Assessment.

A score of '1' would mean that the answer is not clear at all, where a '5' would mean the answer is crystal clear and defined. Leave empty when the question is not applicable



or you don't want to answer it, you can skip it without affecting your score. Write your score in the space provided.

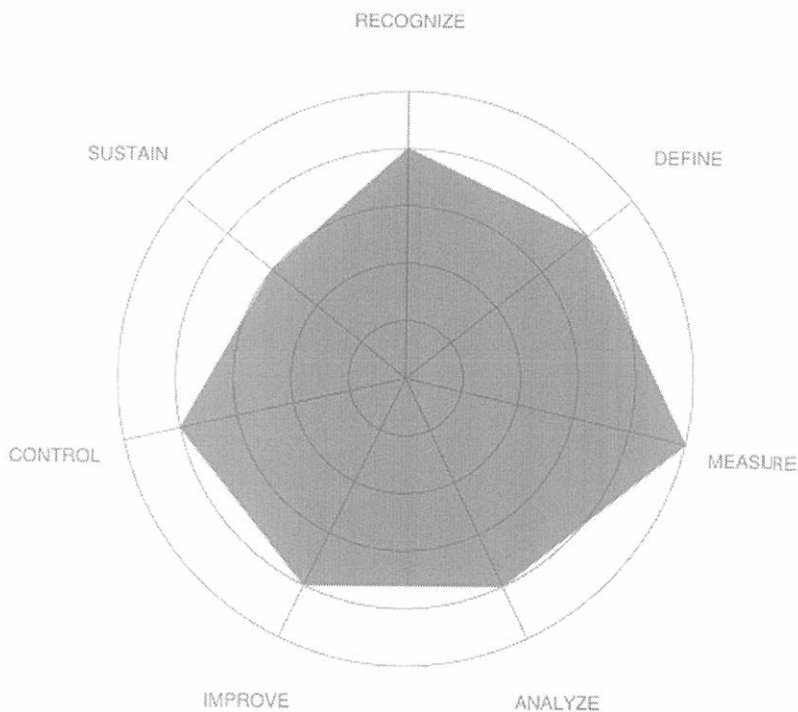
After you have responded to all the appropriate statements in each section, compute your average score for that section, using the formula provided, and round to the nearest tenth. Then transfer to the corresponding spoke in the HSE Scorecard on the second next page of the Self-Assessment.

Your completed HSE Scorecard will give you a clear presentation of which HSE areas need attention.

# HSE

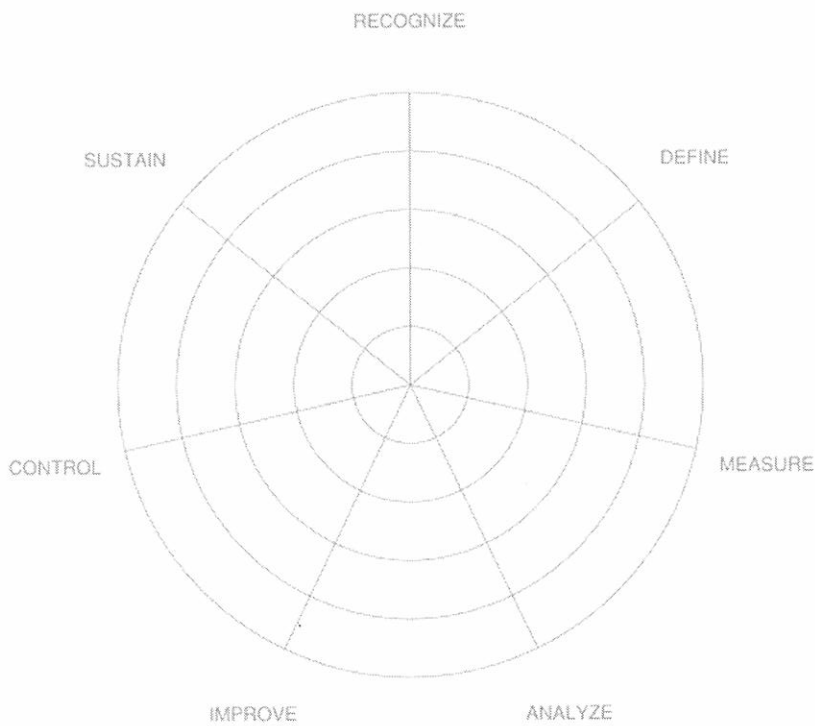
## Scorecard Example

Example of how the finalized Scorecard can look like:



# HSE Scorecard

Your Scores:



## **BEGINNING OF THE SELF-ASSESSMENT:**

# CRITERION #1: RECOGNIZE

INTENT: Be aware of the need for change. Recognize that there is an unfavorable variation, problem or symptom.

In my belief, the answer to this question is clearly defined:

5 Strongly Agree

4 Agree

3 Neutral

2 Disagree

1 Strongly Disagree

1. Are your goals realistic? Do you need to redefine your problem? Perhaps the problem has changed or maybe you have reached your goal and need to set a new one?

<--- Score

2. What is the extent or complexity of the HSE problem?

<--- Score

3. What is the HSE problem definition? What do you need to resolve?

<--- Score

**4. How are language issues (if any) dealt with?**

<--- Score

5. Which issues are too important to ignore?

<--- Score

6. Is the need for organizational change recognized?

<--- Score

7. What vendors make products that address the HSE needs?

<--- Score

8. Who needs budgets?

<--- Score

9. For your HSE project, identify and describe the business environment, is there more than one layer to the business environment?

<--- Score

**10. Is management interested in communicating issues with the workforce?**

<--- Score

11. How much are sponsors, customers, partners, stakeholders involved in HSE? In other words, what are the risks, if HSE does not deliver successfully?

<--- Score

**12. Do you need to use a licensed contractor to**

**clean up?**

<--- Score

13. What problems are you facing and how do you consider HSE will circumvent those obstacles?

<--- Score

**14. Why workplace problems are occurring?**

<--- Score

15. Have you identified your HSE key performance indicators?

<--- Score

16. Are controls defined to recognize and contain problems?

<--- Score

17. How are the HSE's objectives aligned to the group's overall stakeholder strategy?

<--- Score

**18. What can businesses do to support staff suffering from mental health problems?**

<--- Score

19. How does it fit into your organizational needs and tasks?

<--- Score

**20. Is there a procedure to identify and update legal requirements?**

<--- Score

**21. How are training needs identified, in particular with respect to environmental aspects?**

<--- Score

22. What are the clients issues and concerns?

<--- Score

23. What do employees need in the short term?

<--- Score

24. Will new equipment/products be required to facilitate HSE delivery, for example is new software needed?

<--- Score

25. Would you recognize a threat from the inside?

<--- Score

26. Does your organization need more HSE education?

<--- Score

27. Think about the people you identified for your HSE project and the project responsibilities you would assign to them, what kind of training do you think they would need to perform these responsibilities effectively?

<--- Score

**28. How would you recognize a hazardous substance?**

<--- Score

29. Who needs what information?

<--- Score

30. What would happen if HSE weren't done?

<--- Score



**31. Is there a need for a specific EHS?**

<--- Score

32. What else needs to be measured?

<--- Score

33. Who defines the rules in relation to any given issue?

<--- Score

34. What resources or support might you need?

<--- Score

35. What do you need to start doing?

<--- Score

36. Are losses recognized in a timely manner?

<--- Score

37. What are your needs in relation to HSE skills, labor, equipment, and markets?

<--- Score

38. Who else hopes to benefit from it?

<--- Score

39. How can auditing be a preventative security measure?

<--- Score

40. Does HSE create potential expectations in other areas that need to be recognized and considered?

<--- Score

41. Does the problem have ethical dimensions?

<--- Score

42. What does HSE success mean to the stakeholders?

<--- Score

43. How do you identify subcontractor relationships?

<--- Score

44. How are you going to measure success?

<--- Score

45. Are there regulatory / compliance issues?

<--- Score

46. How do you take a forward-looking perspective in identifying HSE research related to market response and models?

<--- Score

47. What tools and technologies are needed for a custom HSE project?

<--- Score

48. What situation(s) led to this HSE Self Assessment?

<--- Score

49. How many trainings, in total, are needed?

<--- Score

50. What needs to be done?

<--- Score

51. Do you have/need 24-hour access to key personnel?

<--- Score

52. What should be considered when identifying available resources, constraints, and deadlines?  
<--- Score

53. Do you need different information or graphics?  
<--- Score

54. Will it solve real problems?  
<--- Score

55. Which needs are not included or involved?  
<--- Score

**56. Who has the authority to support implementation of any identified changes?**  
<--- Score

57. Why is this needed?  
<--- Score

58. Are employees recognized for desired behaviors?  
<--- Score

59. What is the recognized need?  
<--- Score

60. Where is training needed?  
<--- Score

61. As a sponsor, customer or management, how important is it to meet goals, objectives?  
<--- Score

**62. Are arrangements in place to identify and deal with poor professional performance?**  
<--- Score

**63. Are records legible, identifiable and traceable?**

<--- Score

64. What HSE problem should be solved?

<--- Score

65. What are the expected benefits of HSE to the stakeholder?

<--- Score

66. What extra resources will you need?

<--- Score

67. Who are your key stakeholders who need to sign off?

<--- Score

68. What is the problem or issue?

<--- Score

69. Are there any specific expectations or concerns about the HSE team, HSE itself?

<--- Score

70. Is it clear when you think of the day ahead of you what activities and tasks you need to complete?

<--- Score

**71. Have access, mobility & oh&s issues been addressed?**

<--- Score

**72. What additional factors need to be taken into account?**

<--- Score

**73. What resources are needed to conduct a hazard classification?**

<--- Score

74. To what extent does each concerned units management team recognize HSE as an effective investment?

<--- Score

75. What prevents you from making the changes you know will make you a more effective HSE leader?

<--- Score

76. What are the stakeholder objectives to be achieved with HSE?

<--- Score

77. Why the need?

<--- Score

78. How do you recognize an objection?

<--- Score

79. When a HSE manager recognizes a problem, what options are available?

<--- Score

80. What is the problem and/or vulnerability?

<--- Score

**81. Do you review the effectiveness of corrective and preventive action?**

<--- Score

82. Are employees recognized or rewarded for

performance that demonstrates the highest levels of integrity?

<--- Score

83. What are the HSE resources needed?

<--- Score

84. Are problem definition and motivation clearly presented?

<--- Score

85. Who needs to know?

<--- Score

**86. Can technology make your job easier and increase organizations accident prevention effectiveness?**

<--- Score

87. Do you recognize HSE achievements?

<--- Score

88. Are there any revenue recognition issues?

<--- Score

89. How are training requirements identified?

<--- Score

Add up total points for this section:  
\_\_\_\_\_ = Total points for this section

Divided by: \_\_\_\_\_ (number of  
statements answered) = \_\_\_\_\_  
Average score for this section

Transfer your score to the HSE Index at

the beginning of the Self-Assessment.

## CRITERION #2: DEFINE:

INTENT: Formulate the stakeholder problem. Define the problem, needs and objectives.

In my belief, the answer to this question is clearly defined:

5 Strongly Agree

4 Agree

3 Neutral

2 Disagree

1 Strongly Disagree

1. How can the value of HSE be defined?

<--- Score

2. Who defines (or who defined) the rules and roles?

<--- Score

3. Will a HSE production readiness review be required?

<--- Score



**4. How are the requirements reviewed, and by whom?**

<--- Score

5. Has your scope been defined?

<--- Score

6. Does the team have regular meetings?

<--- Score

7. How do you think the partners involved in HSE would have defined success?

<--- Score

8. What are the rough order estimates on cost savings/opportunities that HSE brings?

<--- Score

**9. How is the fulfilment of implicit requirements assured?**

<--- Score

10. Is the current 'as is' process being followed? If not, what are the discrepancies?

<--- Score

11. Have all of the relationships been defined properly?

<--- Score

12. Is there a HSE management charter, including stakeholder case, problem and goal statements, scope, milestones, roles and responsibilities, communication plan?

<--- Score

13. Has the improvement team collected the 'voice of the customer' (obtained feedback – qualitative and quantitative)?

<--- Score

14. What are the dynamics of the communication plan?

<--- Score

**15. What are the statutory and regulatory requirements?**

<--- Score

16. Do you have organizational privacy requirements?

<--- Score

17. Has a HSE requirement not been met?

<--- Score

18. What information should you gather?

<--- Score

19. Is there a critical path to deliver HSE results?

<--- Score

20. What critical content must be communicated – who, what, when, where, and how?

<--- Score

**21. Are all team members working to staff requirements?**

<--- Score

**22. How is review of product requirements carried out?**

<--- Score

23. Has the HSE work been fairly and/or equitably divided and delegated among team members who are qualified and capable to perform the work? Has everyone contributed?

<--- Score

24. What intelligence can you gather?

<--- Score

25. When is the estimated completion date?

<--- Score

26. What specifically is the problem? Where does it occur? When does it occur? What is its extent?

<--- Score

27. Are there different segments of customers?

<--- Score

28. Is the HSE scope complete and appropriately sized?

<--- Score

29. What was the context?

<--- Score

30. What constraints exist that might impact the team?

<--- Score

31. What HSE services do you require?

<--- Score

32. Are required metrics defined, what are they?

<--- Score

33. Do the problem and goal statements meet the SMART criteria (specific, measurable, attainable, relevant, and time-bound)?

<--- Score

34. How do you manage changes in HSE requirements?

<--- Score

35. What are the HSE use cases?

<--- Score

36. What is a worst-case scenario for losses?

<--- Score

37. Is there regularly 100% attendance at the team meetings? If not, have appointed substitutes attended to preserve cross-functionality and full representation?

<--- Score

38. What are the HSE tasks and definitions?

<--- Score

39. How do you hand over HSE context?

<--- Score

40. Will team members regularly document their HSE work?

<--- Score

41. When are meeting minutes sent out? Who is on the distribution list?

<--- Score

42. Is the team adequately staffed with the desired cross-functionality? If not, what additional resources are available to the team?

<--- Score

43. How often are the team meetings?

<--- Score

44. Is HSE currently on schedule according to the plan?

<--- Score

45. What is out of scope?

<--- Score

46. What are the compelling stakeholder reasons for embarking on HSE?

<--- Score

47. Has anyone else (internal or external to the group) attempted to solve this problem or a similar one before? If so, what knowledge can be leveraged from these previous efforts?

<--- Score

**48. Is a health and safety audit a legal requirement?**

<--- Score

49. When is/was the HSE start date?

<--- Score

50. Are customer(s) identified and segmented according to their different needs and requirements?

<--- Score

51. What would be the goal or target for a HSE's improvement team?

<--- Score

52. How did the HSE manager receive input to the development of a HSE improvement plan and the estimated completion dates/times of each activity?

<--- Score

53. Have all basic functions of HSE been defined?

<--- Score

54. What scope to assess?

<--- Score

55. Have the customer needs been translated into specific, measurable requirements? How?

<--- Score

56. What are the Roles and Responsibilities for each team member and its leadership? Where is this documented?

<--- Score

57. Has a project plan, Gantt chart, or similar been developed/completed?

<--- Score

**58. Who defines quality requirements for goods and services?**

<--- Score

59. Who are the HSE improvement team members, including Management Leads and Coaches?

<--- Score

**60. How are the requirements taken into account?**

<--- Score

61. If substitutes have been appointed, have they been briefed on the HSE goals and received regular communications as to the progress to date?

<--- Score

62. What knowledge or experience is required?

<--- Score

63. Are resources adequate for the scope?

<--- Score

64. Are the HSE requirements testable?

<--- Score

65. What are the requirements for audit information?

<--- Score

66. How do you manage scope?

<--- Score

67. Has a team charter been developed and communicated?

<--- Score

68. Is the team equipped with available and reliable resources?

<--- Score

69. Is HSE linked to key stakeholder goals and objectives?

<--- Score

70. Are approval levels defined for contracts and

supplements to contracts?

<--- Score

71. Has the direction changed at all during the course of HSE? If so, when did it change and why?

<--- Score

72. Scope of sensitive information?

<--- Score

73. What is the scope of the HSE work?

<--- Score

74. Are there any constraints known that bear on the ability to perform HSE work? How is the team addressing them?

<--- Score

75. How will variation in the actual durations of each activity be dealt with to ensure that the expected HSE results are met?

<--- Score

76. Why are you doing HSE and what is the scope?

<--- Score

77. Have specific policy objectives been defined?

<--- Score

**78. Which must your safety helmet comply with to meet with the requirements of the Construction (Head Protection) Regulations?**

<--- Score

79. What HSE requirements should be gathered?

<--- Score



**80. Who defines the requirements for personnel involved in a purchased service?**

<--- Score

81. Who approved the HSE scope?

<--- Score

82. What are the tasks and definitions?

<--- Score

83. Is there a completed SIPOC representation, describing the Suppliers, Inputs, Process, Outputs, and Customers?

<--- Score

**84. How are the customer requirements determined?**

<--- Score

85. How will the HSE team and the group measure complete success of HSE?

<--- Score

**86. Are there requirements other than legal?**

<--- Score

**87. Is ethical review required for clinical audit?**

<--- Score

88. Who is gathering information?

<--- Score

89. What system do you use for gathering HSE information?

<--- Score

90. How was the 'as is' process map developed, reviewed, verified and validated?

<--- Score

91. Has a high-level 'as is' process map been completed, verified and validated?

<--- Score

92. How are consistent HSE definitions important?

<--- Score

93. What is the definition of HSE excellence?

<--- Score

94. How is the team tracking and documenting its work?

<--- Score

95. How do you gather the stories?

<--- Score

96. Does the scope remain the same?

<--- Score

**97. How is access to the requirements organized?**

<--- Score

98. Is there a completed, verified, and validated high-level 'as is' (not 'should be' or 'could be') stakeholder process map?

<--- Score

99. Where can you gather more information?

<--- Score

100. Has everyone on the team, including the team leaders, been properly trained?

<--- Score

101. What are the boundaries of the scope? What is in bounds and what is not? What is the start point? What is the stop point?

<--- Score

102. What is the context?

<--- Score

103. Are accountability and ownership for HSE clearly defined?

<--- Score

104. Is it clearly defined in and to your organization what you do?

<--- Score

105. What baselines are required to be defined and managed?

<--- Score

106. What is in scope?

<--- Score

107. How do you manage unclear HSE requirements?

<--- Score

**108. Are quality objectives for products defined?**

<--- Score

109. How do you keep key subject matter experts in the loop?

<--- Score

110. Is the improvement team aware of the different versions of a process: what they think it is vs. what it actually is vs. what it should be vs. what it could be?  
<--- Score

111. How do you gather HSE requirements?  
<--- Score

112. What customer feedback methods were used to solicit their input?  
<--- Score

113. What key stakeholder process output measure(s) does HSE leverage and how?  
<--- Score

114. What is the scope of the HSE effort?  
<--- Score

115. Is HSE required?  
<--- Score

116. Are all requirements met?  
<--- Score

117. What scope do you want your strategy to cover?  
<--- Score

118. What gets examined?  
<--- Score

**119. Does the metering service provider have an oh&s system to meet jurisdictional and legislative requirements?**  
<--- Score

120. Are different versions of process maps needed to account for the different types of inputs?

<--- Score

121. Has/have the customer(s) been identified?

<--- Score

122. Are the HSE requirements complete?

<--- Score

123. Is the work to date meeting requirements?

<--- Score

124. Is data collected and displayed to better understand customer(s) critical needs and requirements.

<--- Score

**125. When is head protection required to be worn on a construction site to comply with the Construction (Head Protection) Regulations?**

<--- Score

126. Who is gathering HSE information?

<--- Score

127. How have you defined all HSE requirements first?

<--- Score

128. Is the HSE scope manageable?

<--- Score

129. How does the HSE manager ensure against scope creep?

<--- Score

Add up total points for this section:  
\_\_\_\_\_ = Total points for this section

Divided by: \_\_\_\_\_ (number of  
statements answered) = \_\_\_\_\_  
Average score for this section

Transfer your score to the HSE Index at  
the beginning of the Self-Assessment.

## CRITERION #3: MEASURE:

INTENT: Gather the correct data.  
Measure the current performance and  
evolution of the situation.

In my belief, the answer to this  
question is clearly defined:

5 Strongly Agree

4 Agree

3 Neutral

2 Disagree

1 Strongly Disagree

**1. Are incidents rated according to impact and reviewed, where appropriate, to determine contributory factors, root causes and any actions required?**

<--- Score

**2. Is your service desk delivering the service customers wants, or the service that is most cost-effective and least troublesome for your teams?**

<--- Score

3. What are the costs and benefits?

<--- Score

4. Does the HSE task fit the client's priorities?

<--- Score

5. What is an unallowable cost?

<--- Score

6. What are your key HSE organizational performance measures, including key short and longer-term financial measures?

<--- Score

7. How to cause the change?

<--- Score

8. What does a Test Case verify?

<--- Score

**9. What are some specific problems Big Data analytics can solve?**

<--- Score

10. What data was collected (past, present, future/ongoing)?

<--- Score

11. Have changes been properly/adequately analyzed for effect?

<--- Score

12. Are the measurements objective?

<--- Score



13. How do you prevent mis-estimating cost?  
<--- Score

**14. Are risks of all kinds managed in order of priority?**  
<--- Score

**15. Is a formal risk analysis required?**  
<--- Score

16. What charts has the team used to display the components of variation in the process?  
<--- Score

17. How do you verify HSE completeness and accuracy?  
<--- Score

18. What are the current costs of the HSE process?  
<--- Score

19. How do you do risk analysis of rare, cascading, catastrophic events?  
<--- Score

20. What kind of analytics data will be gathered?  
<--- Score

21. What do you measure and why?  
<--- Score

22. What are the operational costs after HSE deployment?  
<--- Score

23. Can you measure the return on analysis?

<--- Score

24. How can a HSE test verify your ideas or assumptions?

<--- Score

25. What is the root cause(s) of the problem?

<--- Score

26. What are hidden HSE quality costs?

<--- Score

27. When is Root Cause Analysis Required?

<--- Score

28. How can you measure HSE in a systematic way?

<--- Score

29. What is the cost of rework?

<--- Score

30. The approach of traditional HSE works for detail complexity but is focused on a systematic approach rather than an understanding of the nature of systems themselves, what approach will permit your organization to deal with the kind of unpredictable emergent behaviors that dynamic complexity can introduce?

<--- Score

31. What happens if cost savings do not materialize?

<--- Score

32. What harm might be caused?

<--- Score

33. Does a HSE quantification method exist?

<--- Score

34. Are the HSE benefits worth its costs?

<--- Score

35. How frequently do you verify your HSE strategy?

<--- Score

36. When are costs are incurred?

<--- Score

37. Was a life-cycle cost analysis performed?

<--- Score

38. Is it possible to estimate the impact of unanticipated complexity such as wrong or failed assumptions, feedback, etcetera on proposed reforms?

<--- Score

39. Is there an opportunity to verify requirements?

<--- Score

40. Are there competing HSE priorities?

<--- Score

41. Can you do HSE without complex (expensive) analysis?

<--- Score

42. How will the HSE data be analyzed?

<--- Score

43. Do the benefits outweigh the costs?

<--- Score

44. Is long term and short term variability accounted for?

<--- Score

45. Is the cost worth the HSE effort ?

<--- Score

46. What are your operating costs?

<--- Score

47. Is Process Variation Displayed/Communicated?

<--- Score

48. How are costs allocated?

<--- Score

**49. Are risk of all kinds managed in order of priority?**

<--- Score

50. Do you effectively measure and reward individual and team performance?

<--- Score

**51. Is there a procedure to identify potential emergencies with environmental and/or safety impact?**

<--- Score

52. What are the strategic priorities for this year?

<--- Score

53. How do you measure success?

<--- Score

**54. Are arrangements in place to manage known high-priority risk issues?**

<--- Score

55. Is the scope of HSE cost analysis cost-effective?

<--- Score

56. Do you have a flow diagram of what happens?

<--- Score

57. What is the HSE business impact?

<--- Score

58. How do you focus on what is right -not who is right?

<--- Score

59. What are the uncertainties surrounding estimates of impact?

<--- Score

60. Is the solution cost-effective?

<--- Score

61. What drives O&M cost?

<--- Score

62. What are the costs of delaying HSE action?

<--- Score

63. Are there any easy-to-implement alternatives to HSE? Sometimes other solutions are available that do not require the cost implications of a full-blown project?

<--- Score

**64. Has a stakeholder analysis been carried out to identify all internal and external stakeholders relating to quality, safety and risk management?**

<--- Score

65. Are supply costs steady or fluctuating?

<--- Score

66. Have you included everything in your HSE cost models?

<--- Score

67. What measurements are possible, practicable and meaningful?

<--- Score

**68. Do committee structures and reporting arrangements provide for coordination and integration of quality, safety and risk activities and priorities?**

<--- Score

69. How can you reduce costs?

<--- Score

70. What would it cost to replace your technology?

<--- Score

71. Have design-to-cost goals been established?

<--- Score

72. How long to keep data and how to manage retention costs?

<--- Score

73. How do you quantify and qualify impacts?

<--- Score

74. Does HSE analysis isolate the fundamental causes of problems?

<--- Score

75. Does management have the right priorities among projects?

<--- Score

**76. How does your EHS program measure up?**

<--- Score

77. Are you aware of what could cause a problem?

<--- Score

78. How will measures be used to manage and adapt?

<--- Score

79. How do you verify your resources?

<--- Score

80. What has the team done to assure the stability and accuracy of the measurement process?

<--- Score

81. Are the units of measure consistent?

<--- Score

82. How much does it cost?

<--- Score

83. Has a cost center been established?

<--- Score

84. What key measures identified indicate the performance of the stakeholder process?

<--- Score

**85. When a hazard is released, what are the recovery measures in place?**

<--- Score

86. What are your primary costs, revenues, assets?

<--- Score

87. How sensitive must the HSE strategy be to cost?

<--- Score

**88. What new employment opportunities have come about because of automation?**

<--- Score

89. Was a data collection plan established?

<--- Score

90. What methods are feasible and acceptable to estimate the impact of reforms?

<--- Score

91. Is there a Performance Baseline?

<--- Score

92. Why do you expend time and effort to implement measurement, for whom?

<--- Score

93. Which stakeholder characteristics are analyzed?

<--- Score

94. What causes extra work or rework?



<--- Score

95. How are you verifying it?

<--- Score

96. Will HSE have an impact on current business continuity, disaster recovery processes and/or infrastructure?

<--- Score

97. Do you have an issue in getting priority?

<--- Score

98. How do you measure lifecycle phases?

<--- Score

99. How is performance measured?

<--- Score

100. How will effects be measured?

<--- Score

101. Have all non-recommended alternatives been analyzed in sufficient detail?

<--- Score

102. How do your measurements capture actionable HSE information for use in exceeding your customers expectations and securing your customers engagement?

<--- Score

103. What are the costs of reform?

<--- Score

104. Who participated in the data collection for

measurements?

<--- Score

105. Who pays the cost?

<--- Score

106. How do you verify the authenticity of the data and information used?

<--- Score

107. When should you bother with diagrams?

<--- Score

108. What do people want to verify?

<--- Score

109. How is the value delivered by HSE being measured?

<--- Score

110. What are your key HSE indicators that you will measure, analyze and track?

<--- Score

**111. Are complaints rated according to impact and reviewed, where appropriate, to determine contributory factors, root cause and any action required?**

<--- Score

112. Are you able to realize any cost savings?

<--- Score

113. Is data collection planned and executed?

<--- Score

114. Does your organization systematically track and analyze outcomes related for accountability and quality improvement?

<--- Score

115. What are the key input variables? What are the key process variables? What are the key output variables?

<--- Score

116. What could cause you to change course?

<--- Score

117. How do you aggregate measures across priorities?

<--- Score

118. Are there measurements based on task performance?

<--- Score

119. What is your HSE quality cost segregation study?

<--- Score

120. At what cost?

<--- Score

121. Was a business case (cost/benefit) developed?

<--- Score

122. What can be used to verify compliance?

<--- Score

123. Where can you go to verify the info?

<--- Score

124. What particular quality tools did the team find helpful in establishing measurements?

<--- Score

125. What are the types and number of measures to use?

<--- Score

126. What users will be impacted?

<--- Score

**127. Are arrangements in place to ensure that the stakeholder analysis is maintained up-to-date?**

<--- Score

128. What are the estimated costs of proposed changes?

<--- Score

129. What potential environmental factors impact the HSE effort?

<--- Score

130. Why a HSE focus?

<--- Score

131. How is progress measured?

<--- Score

132. Among the HSE product and service cost to be estimated, which is considered hardest to estimate?

<--- Score

133. What details are required of the HSE cost structure?

<--- Score

134. How will you measure your HSE effectiveness?  
<--- Score

135. What would be a real cause for concern?  
<--- Score

136. Do staff have the necessary skills to collect, analyze, and report data?  
<--- Score

137. How do you identify and analyze stakeholders and their interests?  
<--- Score

138. What is the total cost related to deploying HSE, including any consulting or professional services?  
<--- Score

139. Have the types of risks that may impact HSE been identified and analyzed?  
<--- Score

140. Have you made assumptions about the shape of the future, particularly its impact on your customers and competitors?  
<--- Score

141. What are the agreed upon definitions of the high impact areas, defect(s), unit(s), and opportunities that will figure into the process capability metrics?  
<--- Score

Add up total points for this section:  
\_\_\_\_\_ = Total points for this section

Divided by: \_\_\_\_\_ (number of  
statements answered) = \_\_\_\_\_  
Average score for this section

Transfer your score to the HSE Index at  
the beginning of the Self-Assessment.

## CRITERION #4: ANALYZE:

INTENT: Analyze causes, assumptions  
and hypotheses.

In my belief, the answer to this  
question is clearly defined:

5 Strongly Agree

4 Agree

3 Neutral

2 Disagree

1 Strongly Disagree

1. What did the team gain from developing a sub-  
process map?

<--- Score

**2. How is staff qualified for validation?**

<--- Score

3. What is the oversight process?

<--- Score

4. What other jobs or tasks affect the performance of the steps in the HSE process?

<--- Score

5. How difficult is it to qualify what HSE ROI is?

<--- Score

6. What are the best opportunities for value improvement?

<--- Score

7. What data is gathered?

<--- Score

8. Was a cause-and-effect diagram used to explore the different types of causes (or sources of variation)?

<--- Score

9. What tools were used to generate the list of possible causes?

<--- Score

10. What internal processes need improvement?

<--- Score

11. What are your current levels and trends in key measures or indicators of HSE product and process performance that are important to and directly serve your customers? How do these results compare with the performance of your competitors and other organizations with similar offerings?

<--- Score

12. What were the financial benefits resulting from any 'ground fruit or low-hanging fruit' (quick fixes)?

<--- Score



13. How was the detailed process map generated, verified, and validated?

<--- Score

14. How is data used for program management and improvement?

<--- Score

15. What HSE data will be collected?

<--- Score

16. How often will data be collected for measures?

<--- Score

17. Who gets your output?

<--- Score

18. Is there an established change management process?

<--- Score

19. How is the way you as the leader think and process information affecting your organizational culture?

<--- Score

**20. Are key performance indicators reviewed regularly to identify and correct shortfalls to drive continuous improvement in quality, safety and risk management?**

<--- Score

21. How will corresponding data be collected?

<--- Score

22. What are your outputs?

<--- Score

23. Were there any improvement opportunities identified from the process analysis?

<--- Score

**24. How are the processes communicated to users?**

<--- Score

**25. Are special processes defined for products?**

<--- Score

26. Do several people in different organizational units assist with the HSE process?

<--- Score

27. Have the problem and goal statements been updated to reflect the additional knowledge gained from the analyze phase?

<--- Score

28. Is there any way to speed up the process?

<--- Score

**29. Is sufficient information and opportunity provided for patient /service users to meaningfully participate in own care?**

<--- Score

30. What are your current levels and trends in key HSE measures or indicators of product and process performance that are important to and directly serve your customers?

<--- Score

31. Are gaps between current performance and the

goal performance identified?

<--- Score

32. Do quality systems drive continuous improvement?

<--- Score

33. How do you measure the operational performance of your key work systems and processes, including productivity, cycle time, and other appropriate measures of process effectiveness, efficiency, and innovation?

<--- Score

34. Did any additional data need to be collected?

<--- Score

35. What are the processes for audit reporting and management?

<--- Score

**36. What opportunities do YOU see for applying clinical governance in your area of work?**

<--- Score

37. A compounding model resolution with available relevant data can often provide insight towards a solution methodology; which HSE models, tools and techniques are necessary?

<--- Score

38. What quality tools were used to get through the analyze phase?

<--- Score

**39. Is sufficient information and opportunity**

**provided for clients/service users to meaningfully participate in own care?**

<--- Score

40. Where is the data coming from to measure compliance?

<--- Score

41. Are you missing HSE opportunities?

<--- Score

42. Think about the functions involved in your HSE project, what processes flow from these functions?

<--- Score

43. How do you use HSE data and information to support organizational decision making and innovation?

<--- Score

44. Has an output goal been set?

<--- Score

45. How do you define collaboration and team output?

<--- Score

**46. How is staff qualified with respect to environmental protection/aspects?**

<--- Score

47. What are the necessary qualifications?

<--- Score

48. What successful thing are you doing today that may be blinding you to new growth opportunities?

<--- Score

49. What other organizational variables, such as reward systems or communication systems, affect the performance of this HSE process?

<--- Score

50. Who is involved in the management review process?

<--- Score

51. How many input/output points does it require?

<--- Score

52. What are your key performance measures or indicators and in-process measures for the control and improvement of your HSE processes?

<--- Score

53. What are the disruptive HSE technologies that enable your organization to radically change your business processes?

<--- Score

54. Did any value-added analysis or 'lean thinking' take place to identify some of the gaps shown on the 'as is' process map?

<--- Score

55. Is the required HSE data gathered?

<--- Score

**56. Where are the processes documented?**

<--- Score

57. Is the gap/opportunity displayed and

communicated in financial terms?

<--- Score

**58. How long should it take to collect the required amount of data?**

<--- Score

59. What information qualified as important?

<--- Score

60. What qualifications are necessary?

<--- Score

61. Were Pareto charts (or similar) used to portray the 'heavy hitters' (or key sources of variation)?

<--- Score

62. What were the crucial 'moments of truth' on the process map?

<--- Score

63. What resources go in to get the desired output?

<--- Score

64. How do you implement and manage your work processes to ensure that they meet design requirements?

<--- Score

65. Were any designed experiments used to generate additional insight into the data analysis?

<--- Score

66. Was a detailed process map created to amplify critical steps of the 'as is' stakeholder process?

<--- Score

67. What data do you need to collect?

<--- Score

**68. Is it possible to alter your work process in order to eliminate or reduce the risk of a hazard?**

<--- Score

69. Are HSE changes recognized early enough to be approved through the regular process?

<--- Score

70. What HSE data should be managed?

<--- Score

71. Where is HSE data gathered?

<--- Score

72. What HSE data do you gather or use now?

<--- Score

73. Is the suppliers process defined and controlled?

<--- Score

74. What qualifications are needed?

<--- Score

75. Is the HSE process severely broken such that a re-design is necessary?

<--- Score

76. Is pre-qualification of suppliers carried out?

<--- Score

77. Is there a strict change management process?

<--- Score

78. Is the performance gap determined?

<--- Score

79. What is the HSE Driver?

<--- Score

80. What are the HSE design outputs?

<--- Score

81. What methods do you use to gather HSE data?

<--- Score

82. What are the personnel training and qualifications required?

<--- Score

**83. How is the process performance measured?**

<--- Score

84. What are the revised rough estimates of the financial savings/opportunity for HSE improvements?

<--- Score

85. What conclusions were drawn from the team's data collection and analysis? How did the team reach these conclusions?

<--- Score

86. Have you defined which data is gathered how?

<--- Score

87. What tools were used to narrow the list of possible causes?

<--- Score



88. Have any additional benefits been identified that will result from closing all or most of the gaps?

<--- Score

89. What do you need to qualify?

<--- Score

90. Who owns what data?

<--- Score

91. What is your organizations process which leads to recognition of value generation?

<--- Score

92. What systems/processes must you excel at?

<--- Score

93. What is the complexity of the output produced?

<--- Score

94. What is the cost of poor quality as supported by the team's analysis?

<--- Score

**95. Do the outputs meet the requirements?**

<--- Score

96. Is data and process analysis, root cause analysis and quantifying the gap/opportunity in place?

<--- Score

97. How has the HSE data been gathered?

<--- Score

98. How much data can be collected in the given timeframe?

<--- Score

99. What training and qualifications will you need?

<--- Score

100. When should a process be art not science?

<--- Score

101. How do you ensure that the HSE opportunity is realistic?

<--- Score

102. What process improvements will be needed?

<--- Score

103. Has data output been validated?

<--- Score

104. How do mission and objectives affect the HSE processes of your organization?

<--- Score

105. What qualifies as competition?

<--- Score

106. How will the change process be managed?

<--- Score

107. Is the final output clearly identified?

<--- Score

108. Who will facilitate the team and process?

<--- Score

109. What does the data say about the performance of the stakeholder process?

<--- Score

110. How will the data be checked for quality?

<--- Score

111. Should you invest in industry-recognized qualifications?

<--- Score

112. Think about some of the processes you undertake within your organization, which do you own?

<--- Score

**113. Which processes required for production are validated?**

<--- Score

114. What output to create?

<--- Score

115. Do staff qualifications match your project?

<--- Score

**116. Can data be collected within a reasonable time period?**

<--- Score

Add up total points for this section:  
\_\_\_\_\_ = Total points for this section

Divided by: \_\_\_\_\_ (number of  
statements answered) = \_\_\_\_\_  
Average score for this section

Transfer your score to the HSE Index at

the beginning of the Self-Assessment.

## CRITERION #5: IMPROVE:

INTENT: Develop a practical solution.  
Innovate, establish and test the  
solution and to measure the results.

In my belief, the answer to this  
question is clearly defined:

5 Strongly Agree

4 Agree

3 Neutral

2 Disagree

1 Strongly Disagree

### **1. Can incident reporting improve safety?**

<--- Score

### **2. Who controls key decisions that will be made?**

<--- Score

### **3. What can you do to improve?**

<--- Score

4. How are policy decisions made and where?

<--- Score

**5. Is there effective communication and consultation with external stakeholders in relation to quality, safety and risk management?**

<--- Score

6. What resources are required for the improvement efforts?

<--- Score

**7. Is there a documented procedure for identification of environmental aspects?**

<--- Score

**8. Are identified risks properly addressed?**

<--- Score

9. Are procedures documented for managing HSE risks?

<--- Score

10. How is knowledge sharing about risk management improved?

<--- Score

**11. Are risks taken into account during execution of works?**

<--- Score

12. What alternative responses are available to manage risk?

<--- Score

13. Who manages HSE risk?

<--- Score

14. Are the key business and technology risks being managed?

<--- Score

**15. How is the result of verification documented?**

<--- Score

16. What were the underlying assumptions on the cost-benefit analysis?

<--- Score

**17. Does your policy include commitment to comply and improve the effectiveness of the system?**

<--- Score

**18. Are arrangements in place to ensure appropriate recruitment, induction and training & development for staff appropriate to roles and responsibilities?**

<--- Score

**19. Are there structured training programs to ensure that all staff are provided with adequate quality, safety and risk management information, instruction and training appropriate to role?**

<--- Score

**20. Do quality improvement activities utilize a range of quality improvement tools to assist with assessing and diagnosing issues, identifying remedies and measuring improvement?**

<--- Score

**21. Is there effective communication and consultation with internal stakeholders in relation to the purpose, objectives and working arrangements for quality, safety and risk management?**

<--- Score

22. How will you measure the results?

<--- Score

23. Are the risks fully understood, reasonable and manageable?

<--- Score

**24. Which documented procedures are required?**

<--- Score

25. How do you decide how much to remunerate an employee?

<--- Score

26. What attendant changes will need to be made to ensure that the solution is successful?

<--- Score

27. How do you measure progress and evaluate training effectiveness?

<--- Score

**28. Are patient /service users and the public involved in the development of patient information?**

<--- Score

**29. Is the trainers evaluation procedure in compliance with the training objective?**



<--- Score

**30. Have local KPIs been developed for quality, safety and risk management?**

<--- Score

31. To what extent does management recognize HSE as a tool to increase the results?

<--- Score

**32. Are arrangements in place for training staff in appraising and developing policies, procedures, protocols and guidelines and for identifying evidence based best practice?**

<--- Score

33. How does the team improve its work?

<--- Score

34. What is HSE risk?

<--- Score

35. What tools were most useful during the improve phase?

<--- Score

36. When you map the key players in your own work and the types/domains of relationships with them, which relationships do you find easy and which challenging, and why?

<--- Score

37. Are the most efficient solutions problem-specific?

<--- Score

**38. Do managers and clinicians at all levels**

**demonstrate commitment to the management of quality, safety and risk?**

<--- Score

39. Who are the people involved in developing and implementing HSE?

<--- Score

**40. Are clients/ service users and the public involved in the development of patient information?**

<--- Score

**41. Are training programs evaluated?**

<--- Score

**42. Are arrangements in place to ensure appropriate recruitment, induction, and training and development for staff appropriate to roles and responsibilities?**

<--- Score

**43. Are the results of independent and other audits used to improve your organizations quality, safety and risk management systems?**

<--- Score

44. What are the expected HSE results?

<--- Score

45. Who do you report HSE results to?

<--- Score

46. How risky is your organization?

<--- Score

**47. Are arrangements in place to ensure that, where new services are being established, the development of policies, procedures, protocols and guidelines is considered at the time of commissioning?**

<--- Score

**48. Do your organization director and senior management receive sufficient assurance on the systems in place for quality, safety and risk management?**

<--- Score

49. At what point will vulnerability assessments be performed once HSE is put into production (e.g., ongoing Risk Management after implementation)?

<--- Score

50. Does the goal represent a desired result that can be measured?

<--- Score

**51. Do the KPIs demonstrate that there is on-going improvement in quality, safety and risk management?**

<--- Score

**52. Why undertake the clinical governance development assurance check?**

<--- Score

53. Is the measure of success for HSE understandable to a variety of people?

<--- Score

**54. Are arrangements in place to ensure that**

**where new services are being established, the development of policies, procedures, protocols and guidelines is considered at the time of commissioning?**

<--- Score

55. What risks do you need to manage?

<--- Score

56. What to do with the results or outcomes of measurements?

<--- Score

57. How can you improve HSE?

<--- Score

58. For estimation problems, how do you develop an estimation statement?

<--- Score

**59. How are the hazards and risks managed?**

<--- Score

60. Is any HSE documentation required?

<--- Score

**61. Are risks of all kinds systematically identified and assessed?**

<--- Score

**62. Are the results of independent and other audits used to improve organizations quality, safety and risk management systems?**

<--- Score

63. What tools do you use once you have decided

on a HSE strategy and more importantly how do you choose?

<--- Score

64. How will you know that you have improved?

<--- Score

65. How will you recognize and celebrate results?

<--- Score

**66. Is a specified portion of your organizations annual budget committed to achieving defined goals for quality, safety and risk management?**

<--- Score

67. What are the affordable HSE risks?

<--- Score

68. What should a proof of concept or pilot accomplish?

<--- Score

69. What is the HSE's sustainability risk?

<--- Score

**70. Do quality improvement activities utilise a range of quality improvement tools to assist with assessing and diagnosing issues, identifying remedies and measuring improvement?**

<--- Score

**71. Will products look more attractive when evaluated jointly or when evaluated separately?**

<--- Score

72. What are the HSE security risks?

<--- Score

**73. Is there a documented procedure for the control of records?**

<--- Score

74. Are risk management tasks balanced centrally and locally?

<--- Score

75. How can you better manage risk?

<--- Score

76. What is the magnitude of the improvements?

<--- Score

77. What were the criteria for evaluating a HSE pilot?

<--- Score

**78. How is training effectiveness evaluated?**

<--- Score

79. Have you identified breakpoints and/or risk tolerances that will trigger broad consideration of a potential need for intervention or modification of strategy?

<--- Score

80. What are the concrete HSE results?

<--- Score

81. Is HSE documentation maintained?

<--- Score

82. Are risk triggers captured?

<--- Score

83. Can you integrate quality management and risk management?

<--- Score

84. Who manages supplier risk management in your organization?

<--- Score

85. Is there any other HSE solution?

<--- Score

86. How do you link measurement and risk?

<--- Score

87. How significant is the improvement in the eyes of the end user?

<--- Score

88. What improvements have been achieved?

<--- Score

89. How do you improve productivity?

<--- Score

90. How are HSE risks managed?

<--- Score

**91. Have actions been taken to eliminate or minimise the hazards and risks documented?**

<--- Score

92. How do you improve HSE service perception, and satisfaction?

<--- Score

93. What tools were used to evaluate the potential solutions?

<--- Score

94. How will you know when its improved?

<--- Score

95. What does the 'should be' process map/design look like?

<--- Score

96. How do you go about comparing HSE approaches/solutions?

<--- Score

97. Who are the HSE decision makers?

<--- Score

**98. Have you assessed the risk level of the hazards?**

<--- Score

99. Is the HSE solution sustainable?

<--- Score

100. What communications are necessary to support the implementation of the solution?

<--- Score

101. What error proofing will be done to address some of the discrepancies observed in the 'as is' process?

<--- Score

**102. How are risks associated with identified hazards identified?**

<--- Score



**103. Where are you now in controlling hazards and risks?**

<--- Score

**104. How should the Platform be leveraged by each potential solution style?**

<--- Score

**105. What evidence exists to demonstrate improvement?**

<--- Score

**106. Are there procedures ensuring the periodical evaluation of compliance with legal requirements?**

<--- Score

107. How will you know that a change is an improvement?

<--- Score

108. Who makes the HSE decisions in your organization?

<--- Score

109. Who will be responsible for making the decisions to include or exclude requested changes once HSE is underway?

<--- Score

110. Is the HSE documentation thorough?

<--- Score

111. Which HSE solution is appropriate?

<--- Score

112. Is risk periodically assessed?

<--- Score

113. What tools were used to tap into the creativity and encourage 'outside the box' thinking?

<--- Score

114. Who will be using the results of the measurement activities?

<--- Score

115. What assumptions are made about the solution and approach?

<--- Score

116. What do you want to improve?

<--- Score

**117. How do you improve manufacturing operations faster and more efficiently?**

<--- Score

118. What is HSE's impact on utilizing the best solution(s)?

<--- Score

119. Who are the HSE decision-makers?

<--- Score

120. What strategies for HSE improvement are successful?

<--- Score

**121. Is an on-going program of patient safety improvement in operation?**

<--- Score

122. Is supporting HSE documentation required?  
<--- Score

123. Do you cover the five essential competencies: Communication, Collaboration, Innovation, Adaptability, and Leadership that improve an organizations ability to leverage the new HSE in a volatile global economy?  
<--- Score

124. Have you achieved HSE improvements?  
<--- Score

125. Who controls the risk?  
<--- Score

**126. Are risk registers used for the purpose of managing and communicating risk at all levels?**  
<--- Score

127. What is the team's contingency plan for potential problems occurring in implementation?  
<--- Score

128. What lessons, if any, from a pilot were incorporated into the design of the full-scale solution?  
<--- Score

129. How do you manage HSE risk?  
<--- Score

130. Will the controls trigger any other risks?  
<--- Score

**131. Do all internal stakeholders have a clear**

**understanding of the purpose, objectives and working arrangements for quality, safety and risk management?**

<--- Score

**132. Do the documented accountability arrangements ensure that that your organization director is fully informed in relation to key areas of quality, safety and risk performance?**

<--- Score

133. What is the risk?

<--- Score

134. Was a HSE charter developed?

<--- Score

135. What is the implementation plan?

<--- Score

136. How is continuous improvement applied to risk management?

<--- Score

**137. Do the KPIs that you use show, over time, that improvements in the quality and safety of care, together with improvements in risk management generally, are being realised?**

<--- Score

138. What went well, what should change, what can improve?

<--- Score

139. Do you combine technical expertise with business knowledge and HSE Key topics include

lifecycles, development approaches, requirements and how to make a business case?

<--- Score

140. How can the phases of HSE development be identified?

<--- Score

141. How is the HSE Value Stream Mapping managed?

<--- Score

142. How do you mitigate HSE risk?

<--- Score

Add up total points for this section:

\_\_\_\_\_ = Total points for this section

Divided by: \_\_\_\_\_ (number of statements answered) = \_\_\_\_\_

Average score for this section

Transfer your score to the HSE Index at the beginning of the Self-Assessment.

## CRITERION #6: CONTROL:

INTENT: Implement the practical solution. Maintain the performance and correct possible complications.

In my belief, the answer to this question is clearly defined:

5 Strongly Agree

4 Agree

3 Neutral

2 Disagree

1 Strongly Disagree

1. Is there a recommended audit plan for routine surveillance inspections of HSE's gains?

<--- Score

2. Who controls critical resources?

<--- Score

3. Has the improved process and its steps been standardized?

<--- Score

4. Is knowledge gained on process shared and institutionalized?

<--- Score

5. Has the HSE value of standards been quantified?

<--- Score

6. What is your theory of human motivation, and how does your compensation plan fit with that view?

<--- Score

7. Do you monitor the HSE decisions made and fine tune them as they evolve?

<--- Score

**8. Does your organization operate a standardised document control process for all policies, procedures, protocols and guidelines?**

<--- Score

9. Who will be in control?

<--- Score

**10. Are clients/service users and the public invited to assist in planning new services?**

<--- Score

**11. Are identified risks taken into account in the planning of training actions?**

<--- Score

12. Is a response plan established and deployed?

<--- Score

13. How will new or emerging customer needs/ requirements be checked/communicated to orient the process toward meeting the new specifications and continually reducing variation?

<--- Score

14. What should the next improvement project be that is related to HSE?

<--- Score

15. What is the control/monitoring plan?

<--- Score

16. Does job training on the documented procedures need to be part of the process team's education and training?

<--- Score

17. How do you plan for the cost of succession?

<--- Score

18. Does a troubleshooting guide exist or is it needed?

<--- Score

19. How do you spread information?

<--- Score

**20. Are incidents subjected to periodic aggregate reviews to identify trends and further opportunities for learning, quality and safety improvement, and risk reduction?**

<--- Score

21. What are the performance and scale of the HSE tools?

<--- Score



22. What should you measure to verify efficiency gains?

<--- Score

**23. Does your organization share information and learning about serious incidents with other health providers and departments?**

<--- Score

24. What are the critical parameters to watch?

<--- Score

25. Does the response plan contain a definite closed loop continual improvement scheme (e.g., plan-do-check-act)?

<--- Score

26. Is there a standardized process?

<--- Score

27. Is there a transfer of ownership and knowledge to process owner and process team tasked with the responsibilities.

<--- Score

**28. What standards will you be auditing against?**

<--- Score

29. How will report readings be checked to effectively monitor performance?

<--- Score

**30. Are the KPIs monitored as part of on-going quality, safety and risk management improvement activities?**

<--- Score

31. What HSE standards are applicable?

<--- Score

32. You may have created your quality measures at a time when you lacked resources, technology wasn't up to the required standard, or low service levels were the industry norm. Have those circumstances changed?

<--- Score

33. Are operating procedures consistent?

<--- Score

34. Are controls in place and consistently applied?

<--- Score

35. What are the key elements of your HSE performance improvement system, including your evaluation, organizational learning, and innovation processes?

<--- Score

36. Will any special training be provided for results interpretation?

<--- Score

37. What do your reports reflect?

<--- Score

38. Is there a documented and implemented monitoring plan?

<--- Score

39. How will the day-to-day responsibilities for

monitoring and continual improvement be transferred from the improvement team to the process owner?

<--- Score

**40. How integrated are environmental, quality and other standardized management systems?**

<--- Score

41. Can you adapt and adjust to changing HSE situations?

<--- Score

42. Is there a control plan in place for sustaining improvements (short and long-term)?

<--- Score

**43. Are quality, safety and risk management goals clear, communicated effectively throughout your organization and reflected in relevant service planning processes?**

<--- Score

**44. Is there evidence that clinical effectiveness activities result in changes in clinical practice and improvements in the standards of care?**

<--- Score

45. How do you plan on providing proper recognition and disclosure of supporting companies?

<--- Score

**46. How are identified risks dealt with and monitored?**

<--- Score

47. What quality tools were useful in the control phase?

<--- Score

48. Are new process steps, standards, and documentation ingrained into normal operations?

<--- Score

49. Are pertinent alerts monitored, analyzed and distributed to appropriate personnel?

<--- Score

50. How will the process owner and team be able to hold the gains?

<--- Score

**51. What must be considered first when planning to carry out work in a confined space?**

<--- Score

52. What other areas of the group might benefit from the HSE team's improvements, knowledge, and learning?

<--- Score

53. How might the group capture best practices and lessons learned so as to leverage improvements?

<--- Score

54. What are customers monitoring?

<--- Score

55. Who is the HSE process owner?

<--- Score

56. How do senior leaders actions reflect a

commitment to the organizations HSE values?

<--- Score

57. Are the planned controls working?

<--- Score

58. How will input, process, and output variables be checked to detect for sub-optimal conditions?

<--- Score

59. Have new or revised work instructions resulted?

<--- Score

60. How do your controls stack up?

<--- Score

61. Do you monitor the effectiveness of your HSE activities?

<--- Score

62. Implementation Planning: is a pilot needed to test the changes before a full roll out occurs?

<--- Score

63. How will the process owner verify improvement in present and future sigma levels, process capabilities?

<--- Score

**64. Do the assurances received by your organization director and senior management form an integral part of on-going monitoring and review processes?**

<--- Score

65. Is reporting being used or needed?

<--- Score

66. In the case of a HSE project, the criteria for the audit derive from implementation objectives, an audit of a HSE project involves assessing whether the recommendations outlined for implementation have been met, can you track that any HSE project is implemented as planned, and is it working?

<--- Score

67. How do you select, collect, align, and integrate HSE data and information for tracking daily operations and overall organizational performance, including progress relative to strategic objectives and action plans?

<--- Score

68. Are suggested corrective/restorative actions indicated on the response plan for known causes to problems that might surface?

<--- Score

69. What is your plan to assess your security risks?

<--- Score

70. What is the recommended frequency of auditing?

<--- Score

71. Is new knowledge gained imbedded in the response plan?

<--- Score

72. What key inputs and outputs are being measured on an ongoing basis?

<--- Score

73. What other systems, operations, processes, and

infrastructures (hiring practices, staffing, training, incentives/rewards, metrics/dashboards/scorecards, etc.) need updates, additions, changes, or deletions in order to facilitate knowledge transfer and improvements?

<--- Score

74. Are documented procedures clear and easy to follow for the operators?

<--- Score

75. How do you establish and deploy modified action plans if circumstances require a shift in plans and rapid execution of new plans?

<--- Score

**76. Does your organization regularly communicate to clients, staff and other relevant stakeholders improvements that have been made as a consequence from learning from patient experience and incidents?**

<--- Score

77. How likely is the current HSE plan to come in on schedule or on budget?

<--- Score

78. Act/Adjust: What Do you Need to Do Differently?

<--- Score

79. What is the standard for acceptable HSE performance?

<--- Score

**80. Does your organization operate a standardized document control process for all policies,**

**procedures, protocols and guidelines?**

<--- Score

**81. Are arrangements in place for learning and for sharing information on good practice in relation to quality, safety and risk management?**

<--- Score

82. Is a response plan in place for when the input, process, or output measures indicate an 'out-of-control' condition?

<--- Score

**83. Do your procedures contain information on how to monitor performance?**

<--- Score

84. How will you measure your QA plan's effectiveness?

<--- Score

**85. Do the assurances received by senior management form an integral part of on-going monitoring and review processes?**

<--- Score

**86. Will project activities be conducted under other standards?**

<--- Score

87. Is there an action plan in case of emergencies?

<--- Score

88. What are the known security controls?

<--- Score



**89. Are arrangements in place to monitor clinical effectiveness activity, including clinical audit?**

<--- Score

**90. Is a structured program in place to systematically monitor and improve the quality of clinical care provided across all services?**

<--- Score

**91. How do you monitor the status of corrective and preventive actions?**

<--- Score

**92. Is the implementation of evidence-based practice through use of recognized standards, guidelines and protocols promoted?**

<--- Score

93. Are the HSE standards challenging?

<--- Score

**94. How are corrective action records controlled?**

<--- Score

95. How can you best use all of your knowledge repositories to enhance learning and sharing?

<--- Score

**96. Are clients/ service users and the public invited to assist in planning new services?**

<--- Score

**97. Are standards available and valid?**

<--- Score

98. Is the HSE test/monitoring cost justified?

<--- Score

99. Do the viable solutions scale to future needs?

<--- Score

100. Are there documented procedures?

<--- Score

101. Where do ideas that reach policy makers and planners as proposals for HSE strengthening and reform actually originate?

<--- Score

102. Against what alternative is success being measured?

<--- Score

103. Who is going to spread your message?

<--- Score

104. Does the HSE performance meet the customer's requirements?

<--- Score

**105. How long will your digital transformation strategy/plan last?**

<--- Score

106. What adjustments to the strategies are needed?

<--- Score

107. Is there documentation that will support the successful operation of the improvement?

<--- Score

108. Do the HSE decisions you make today help

people and the planet tomorrow?

<--- Score

109. What is the best design framework for HSE organization now that, in a post industrial-age if the top-down, command and control model is no longer relevant?

<--- Score

Add up total points for this section:  
\_\_\_\_\_ = Total points for this section

Divided by: \_\_\_\_\_ (number of  
statements answered) = \_\_\_\_\_  
Average score for this section

Transfer your score to the HSE Index at  
the beginning of the Self-Assessment.

## CRITERION #7: SUSTAIN:

INTENT: Retain the benefits.

In my belief, the answer to this question is clearly defined:

5 Strongly Agree

4 Agree

3 Neutral

2 Disagree

1 Strongly Disagree

1. If there were zero limitations, what would you do differently?

<--- Score

**2. Do you carry out regular safety inspections of your workplace?**

<--- Score

3. Think of your HSE project, what are the main functions?

<--- Score

**4. What is the purpose of the principal designer?**

<--- Score

5. Who is responsible for HSE?

<--- Score

**6. Does the approach to inspection take account of the stage of equipment life?**

<--- Score

7. How likely is it that a customer would recommend your company to a friend or colleague?

<--- Score

**8. What is involved in conducting a hazard classification?**

<--- Score

**9. Is there service design without design thinking approach?**

<--- Score

10. How can you become the company that would put you out of business?

<--- Score

11. Political -is anyone trying to undermine this project?

<--- Score

12. What are the business goals HSE is aiming to achieve?

<--- Score

13. How do you accomplish your long range HSE

goals?  
<--- Score

**14. When will ai exceed human performance?**  
<--- Score

15. Why will customers want to buy your organizations products/services?  
<--- Score

**16. What are the challenges with hand hygiene in your workplace?**  
<--- Score

**17. Is the work affected by the unavailability of people to do work within a deadline?**  
<--- Score

18. What are the short and long-term HSE goals?  
<--- Score

19. Have new benefits been realized?  
<--- Score

**20. Is significant sideways twisting of the body involved?**  
<--- Score

**21. Do you have a policy that provides a framework for review of objectives and targets?**  
<--- Score

**22. How is compliance with legislation verified?**  
<--- Score

**23. How is safety at the work place taken into**

**account?**

<--- Score

**24. Why should the end of an optical fibre cable never be pointed towards your own or anyone elses eyes?**

<--- Score

**25. Can this be done remotely, or are additional safeguards and inspection techniques necessary?**

<--- Score

26. How can you become more high-tech but still be high touch?

<--- Score

**27. Do you have a dedicated digital transformation team?**

<--- Score

28. Can you do all this work?

<--- Score

**29. Will your contractor be using sub-contractors?**

<--- Score

30. Where can you break convention?

<--- Score

**31. What are you worth as an EHS professional?**

<--- Score

**32. What will happen if the patient waits and watches?**

<--- Score

33. What are the long-term HSE goals?

<--- Score

34. What is your HSE strategy?

<--- Score

35. Which individuals, teams or departments will be involved in HSE?

<--- Score

36. How can you incorporate support to ensure safe and effective use of HSE into the services that you provide?

<--- Score

**37. How are matters communicated to staff?**

<--- Score

**38. What really is clinical governance?**

<--- Score

**39. What is public procurement compliance?**

<--- Score

40. Can you maintain your growth without detracting from the factors that have contributed to your success?

<--- Score

41. Instead of going to current contacts for new ideas, what if you reconnected with dormant contacts-- the people you used to know? If you were going to reactivate a dormant tie, who would it be?

<--- Score

**42. What do you use to justify your EHS IT**



**projects?**

<--- Score

**43. Who was the next level of management consulted?**

<--- Score

**44. What are the barriers to integrating health, safety and environment into one OHSEMS?**

<--- Score

**45. Do integration difficulties influence management system integration levels?**

<--- Score

46. If you were responsible for initiating and implementing major changes in your organization, what steps might you take to ensure acceptance of those changes?

<--- Score

47. Who is the main stakeholder, with ultimate responsibility for driving HSE forward?

<--- Score

48. Do you think HSE accomplishes the goals you expect it to accomplish?

<--- Score

49. Is your strategy driving your strategy? Or is the way in which you allocate resources driving your strategy?

<--- Score

**50. Who is responsible for signing your organization Safety Policy?**

<--- Score

**51. Is new employee indoctrination provided?**

<--- Score

**52. Is brm the key to unlock ITSM value?**

<--- Score

53. What is your question? Why?

<--- Score

**54. How will your organization market services in a market that is rich with ever-increasing product?**

<--- Score

**55. Who is involved in the delivery of care?**

<--- Score

56. Why is HSE important for you now?

<--- Score

**57. How many lives does an OH&S directive save?**

<--- Score

58. If you find that you havent accomplished one of the goals for one of the steps of the HSE strategy, what will you do to fix it?

<--- Score

**59. Do you replace a diesel vehicle with an electric one?**

<--- Score

**60. How is the safety induction carried out?**

<--- Score

**61. What are the benefits for your enterprise?**

<--- Score

**62. What are the means and time-frame by which the program has to be achieved?**

<--- Score

**63. How is EHS viewed within your organization?**

<--- Score

64. Are you / should you be revolutionary or evolutionary?

<--- Score

**65. What kind of EHS organization should you establish?**

<--- Score

66. Which HSE goals are the most important?

<--- Score

67. Who else should you help?

<--- Score

**68. Do your peers, supervisor, and/or EHS agree?**

<--- Score

**69. Are workers thus getting fair share of benefits from technological change?**

<--- Score

**70. How do hazardous substances affect you?**

<--- Score

71. Do you say no to customers for no reason?

<--- Score

**72. What can occupational health professionals do?**

<--- Score

**73. How frequently are workplace inspections undertaken?**

<--- Score

74. How do you manage HSE Knowledge Management (KM)?

<--- Score

**75. Are there hazardous effects outside the package?**

<--- Score

**76. What benefits could your organization realise from digital transformation?**

<--- Score

**77. What does best practice in OHS governance look like?**

<--- Score

**78. Is employee experience the secret to proving business value?**

<--- Score

79. Which models, tools and techniques are necessary?

<--- Score

**80. Has someone in your workplace been trained to provide first aid?**

<--- Score

**81. Are complaints managed in accordance with an agreed policy?**

<--- Score

82. What is the estimated value of the project?

<--- Score

83. What are the usability implications of HSE actions?

<--- Score

84. How do you listen to customers to obtain actionable information?

<--- Score

**85. Who must conduct hazard classifications?**

<--- Score

86. What is the big HSE idea?

<--- Score

87. Do you know what you are doing? And who do you call if you don't?

<--- Score

88. Why is it important to have senior management support for a HSE project?

<--- Score

**89. Is appropriate language training available?**

<--- Score

90. Are there any activities that you can take off your to do list?

<--- Score

91. Is a HSE breakthrough on the horizon?

<--- Score

**92. Are incidents properly recorded and reported to management?**

<--- Score

**93. How are changes, and the related reviews, recorded?**

<--- Score

**94. What is the purpose of Lockout Tagout?**

<--- Score

**95. Why should regular inspections of the workplace take place?**

<--- Score

96. What are the gaps in your knowledge and experience?

<--- Score

97. Who is on the team?

<--- Score

98. When information truly is ubiquitous, when reach and connectivity are completely global, when computing resources are infinite, and when a whole new set of impossibilities are not only possible, but happening, what will that do to your business?

<--- Score

**99. What sort of equipment, technology and training (including OH&S) should be provided to facilitate working from a remote office?**

<--- Score

**100. What is the extent to which objectives and targets have been met?**

<--- Score

101. How much contingency will be available in the budget?

<--- Score

102. What relationships among HSE trends do you perceive?

<--- Score

103. How will you know that the HSE project has been successful?

<--- Score

104. What is the source of the strategies for HSE strengthening and reform?

<--- Score

105. What information is critical to your organization that your executives are ignoring?

<--- Score

**106. Who are the competent persons in place to give health and safety advice?**

<--- Score

**107. How well involved do you feel in health and safety in your workplace?**

<--- Score

**108. Why should EHS management still be synonymous with excel?**

<--- Score

109. If you had to rebuild your organization without any traditional competitive advantages (i.e., no killer technology, promising research, innovative product/service delivery model, etcetera), how would your people have to approach their work and collaborate together in order to create the necessary conditions for success?

<--- Score

**110. Can leading edge-technologies deliver tangible service desk user benefits?**

<--- Score

111. What is effective HSE?

<--- Score

**112. How is calibration and maintenance of measuring equipment assured?**

<--- Score

**113. What access do employees have to up-to-date information on health and safety legislation?**

<--- Score

114. Who are four people whose careers you have enhanced?

<--- Score

**115. How is external staff made aware of the environmental protection policy and procedures?**

<--- Score

**116. Why provide health and safety training?**

<--- Score



**117. Are the weights of loads to be lifted judged acceptable by the workforce?**

<--- Score

**118. Which quality related matters are communicated, how and when?**

<--- Score

119. What you are going to do to affect the numbers?

<--- Score

120. Operational - will it work?

<--- Score

121. At what moment would you think; Will I get fired?

<--- Score

122. How will you ensure you get what you expected?

<--- Score

**123. Will brm - or any other model - fix its relationship crisis?**

<--- Score

124. What role does communication play in the success or failure of a HSE project?

<--- Score

125. Who will manage the integration of tools?

<--- Score

**126. How far along is your digital transformation project?**

<--- Score

127. What are current HSE paradigms?

<--- Score

**128. Is there a site alarm system, and where and how is it activated?**

<--- Score

**129. What is most important when hiring an OH&S officer?**

<--- Score

130. Can the schedule be done in the given time?

<--- Score

131. What is the kind of project structure that would be appropriate for your HSE project, should it be formal and complex, or can it be less formal and relatively simple?

<--- Score

132. Will there be any necessary staff changes (redundancies or new hires)?

<--- Score

**133. Have workers been through training?**

<--- Score

**134. Do companies and workers still use the dual system?**

<--- Score

135. Do you have the right people on the bus?

<--- Score

136. How do you track customer value, profitability or financial return, organizational success, and sustainability?

<--- Score

137. What one word do you want to own in the minds of your customers, employees, and partners?

<--- Score

**138. Does the patient have enough information to make a choice?**

<--- Score

139. What knowledge, skills and characteristics mark a good HSE project manager?

<--- Score

140. Why not do HSE?

<--- Score

**141. Does staff cover critical steps on work activity?**

<--- Score

142. How do you lead with HSE in mind?

<--- Score

143. Who are your customers?

<--- Score

144. How is implementation research currently incorporated into each of your goals?

<--- Score

**145. Is there under-provision of training?**

<--- Score

146. How will you insure seamless interoperability of HSE moving forward?

<--- Score

147. Is HSE dependent on the successful delivery of a current project?

<--- Score

148. If you weren't already in this business, would you enter it today? And if not, what are you going to do about it?

<--- Score

**149. What strategies does your organization have to ensuring a continuing level of skill and knowledge in the workforce for managing equipment ageing?**

<--- Score

150. What is the funding source for this project?

<--- Score

**151. Is the knowledge acquired in the right way?**

<--- Score

152. Are you satisfied with your current role? If not, what is missing from it?

<--- Score

153. Who are the key stakeholders?

<--- Score

**154. What is a substance hazardous to health?**

<--- Score

155. What happens when a new employee joins the organization?

<--- Score

156. How do you foster innovation?

<--- Score

**157. What reasons exist for managing health & safety?**

<--- Score

**158. Who is responsible?**

<--- Score

159. What are you challenging?

<--- Score

160. If you do not follow, then how to lead?

<--- Score

161. Who, on the executive team or the board, has spoken to a customer recently?

<--- Score

**162. Is there an up to date list of all hazardous substances used or stored?**

<--- Score

163. How can you negotiate HSE successfully with a stubborn boss, an irate client, or a deceitful coworker?

<--- Score

**164. How is internal staff made aware of the environmental protection policy and procedures?**

<--- Score

**165. Where is the autoclave located and has it recently been reviewed by EHS?**

<--- Score

**166. How is appropriate health and safety information communicated to contractors/visitors/members of the public?**

<--- Score

167. Who do you want your customers to become?

<--- Score

**168. When to use the clinical governance assurance check?**

<--- Score

**169. How is staff trained for emergencies?**

<--- Score

170. Is there any reason to believe the opposite of my current belief?

<--- Score

**171. Who can carry out the role of the principal designer?**

<--- Score

**172. What do the blue and white health and safety signs tell you?**

<--- Score

173. What are specific HSE rules to follow?

<--- Score

174. Why should you adopt a HSE framework?

<--- Score

175. What trouble can you get into?

<--- Score

**176. What are the generated financial savings for your organization?**

<--- Score

**177. Does system appear to be functioning properly?**

<--- Score

178. What are the rules and assumptions your industry operates under? What if the opposite were true?

<--- Score

179. Is there any existing HSE governance structure?

<--- Score

**180. How are matters communicated to external workers?**

<--- Score

**181. What is the quality of the evidence?**

<--- Score

**182. How are staff made aware of roles and responsibilities?**

<--- Score

**183. Are incidents managed in accordance with an agreed policy?**

<--- Score

184. In the past year, what have you done (or could you have done) to increase the accurate perception of your company/brand as ethical and honest?

<--- Score

**185. Integrating management systems, does the location matter?**

<--- Score

186. What goals did you miss?

<--- Score

187. Do you see more potential in people than they do in themselves?

<--- Score

188. How do you deal with HSE changes?

<--- Score

189. Are assumptions made in HSE stated explicitly?

<--- Score

**190. When did all managers and supervisors last receive training in relation to health and safety responsibility?**

<--- Score

191. If your company went out of business tomorrow, would anyone who doesn't get a paycheck here care?

<--- Score

**192. What inclusion criteria are employed?**

<--- Score

**193. Are there other organization wide safety trainings?**

<--- Score

194. What are your personal philosophies regarding HSE and how do they influence your work?

<--- Score



**195. How has the OHSEMS been designed to accommodate distinctions and similarities?**

<--- Score

**196. What changes did the service make and why?**

<--- Score

**197. Are protective systems in place as prescribed by the competent person?**

<--- Score

198. How do you determine the key elements that affect HSE workforce satisfaction, how are these elements determined for different workforce groups and segments?

<--- Score

199. How do you ensure that implementations of HSE products are done in a way that ensures safety?

<--- Score

**200. Are tenants responsible for compliance with inspections and permits?**

<--- Score

201. What have you done to protect your business from competitive encroachment?

<--- Score

**202. Can a client carry out the role of the principal designer?**

<--- Score

203. What does your signature ensure?

<--- Score

204. Are you using a design thinking approach and integrating Innovation, HSE Experience, and Brand Value?

<--- Score

**205. Are targets set with respect to environmental protection?**

<--- Score

206. Who will provide the final approval of HSE deliverables?

<--- Score

207. How do customers see your organization?

<--- Score

208. Is a HSE team work effort in place?

<--- Score

**209. What key performance indicators should you disclose to investors?**

<--- Score

**210. How do you best support a mobile workforce used to powerful apps and immediate fixes?**

<--- Score

**211. How do you minimise disruption and still provide great service when breaking a shared service?**

<--- Score

**212. Why is health and safety training important?**

<--- Score

213. What are internal and external HSE relations?  
<--- Score

**214. Have previous audits actions been implemented?**  
<--- Score

**215. Is the quality policy appropriate?**  
<--- Score

216. Is there a work around that you can use?  
<--- Score

**217. Who is in receipt of, uses or benefits from the care or service?**  
<--- Score

**218. What systems are in place for the inspection of access equipment?**  
<--- Score

**219. How are environmental aspects communicated to staff?**  
<--- Score

**220. What are the test or treatment options?**  
<--- Score

**221. What is the preferred nominal voltage for portable hand tools on construction sites?**  
<--- Score

**222. How to use the clinical governance assurance check?**  
<--- Score

223. Are you maintaining a past–present–future perspective throughout the HSE discussion?  
<--- Score

**224. How do you keep the hazardous substance register?**  
<--- Score

**225. What must an employer do with accident records following completion of a construction project?**  
<--- Score

226. How do you proactively clarify deliverables and HSE quality expectations?  
<--- Score

**227. What is most important when hiring an OH&S Manager?**  
<--- Score

228. What HSE skills are most important?  
<--- Score

**229. Is information describing the characteristics of the product available?**  
<--- Score

230. What are the key enablers to make this HSE move?  
<--- Score

231. What could happen if you do not do it?  
<--- Score

232. Are new benefits received and understood?

<--- Score

**233. How much money does the EHS program save?**

<--- Score

234. Is it economical; do you have the time and money?

<--- Score

**235. What is your Integrated Management System?**

<--- Score

**236. What were the motivations behind undertaking a digital transformation Project?**

<--- Score

237. Who will be responsible for deciding whether HSE goes ahead or not after the initial investigations?

<--- Score

238. What are you trying to prove to yourself, and how might it be hijacking your life and business success?

<--- Score

**239. Are the procedures periodically reviewed?**

<--- Score

240. What potential megatrends could make your business model obsolete?

<--- Score

241. Has implementation been effective in reaching specified objectives so far?

<--- Score

242. What is the range of capabilities?

<--- Score

243. What are your most important goals for the strategic HSE objectives?

<--- Score

244. What have been your experiences in defining long range HSE goals?

<--- Score

245. How do you maintain HSE's Integrity?

<--- Score

246. How are you doing compared to your industry?

<--- Score

**247. Who would you expect to be responsible for managing health and safety on site?**

<--- Score

**248. Can the hazard be eliminated or minimized?**

<--- Score

**249. Are arrangements in place to ensure that medical device alerts/safety notices are circulated to all relevant staff and are acted on?**

<--- Score

250. Are you paying enough attention to the partners your company depends on to succeed?

<--- Score

251. Do you have an implicit bias for capital investments over people investments?

<--- Score

**252. What about the socialization of OHS programs to workers?**

<--- Score

253. Can you break it down?

<--- Score

254. How do you make it meaningful in connecting HSE with what users do day-to-day?

<--- Score

**255. What feedback are you getting from line managers and the people who have been trained?**

<--- Score

256. Are you relevant? Will you be relevant five years from now? Ten?

<--- Score

257. What was the last experiment you ran?

<--- Score

**258. What is your perspective on the capabilities EHS consulting providers?**

<--- Score

259. What stupid rule would you most like to kill?

<--- Score

**260. How do you manage follow-up actions from previous management reviews?**

<--- Score

**261. What is your overall impression of health and safety management of your workplace?**

<--- Score

**262. Are the policies reviewed regularly?**

<--- Score

263. What HSE modifications can you make work for you?

<--- Score

**264. Do all workers receive training when there are any changes at the workplace?**

<--- Score

**265. Are information systems being properly exploited to support clinical effectiveness activity?**

<--- Score

**266. How has automation effected the workforce?**

<--- Score

267. What is something you believe that nearly no one agrees with you on?

<--- Score

**268. What are the key challenges in delivering an effective occupational health management strategy?**

<--- Score

**269. How is safety induction carried out?**

<--- Score

Add up total points for this section:  
\_\_\_\_\_ = Total points for this section

Divided by: \_\_\_\_\_ (number of



statements answered) = \_\_\_\_\_  
Average score for this section

Transfer your score to the HSE Index at  
the beginning of the Self-Assessment.

## **HSE and Managing Projects, Criteria for Project Managers:**

# 1.0 Initiating Process Group: HSE

1. Who does what?
2. What will be the pressing issues of tomorrow?
3. Just how important is your work to the overall success of the HSE project?
4. The process to Manage Stakeholders is part of which process group?
5. During which stage of Risk planning are modeling techniques used to determine overall effects of risks on HSE project objectives for high probability, high impact risks?
6. Who is behind the HSE project?
7. Were decisions made in a timely manner?
8. What communication items need improvement?
9. Contingency planning. if a risk event occurs, what will you do?
10. Are the HSE project team and stakeholders meeting regularly and using a meeting agenda and taking notes to accurately document what is being covered and what happened in the weekly meetings?
11. Mitigate. what will you do to minimize the impact should the risk event occur?
12. Were resources available as planned?

13. Do you understand the communication expectations for this HSE project?
14. During which stage of Risk planning are risks prioritized based on probability and impact?
15. What are the constraints?
16. Who is involved in each phase?
17. How will you know you did it?
18. Do you understand all business (operational), technical, resource and vendor risks associated with the HSE project?
19. What business situation is being addressed?
20. Does the HSE project team have enough people to execute the HSE project plan?

## 1.1 Project Charter: HSE

21. How will you know a change is an improvement?
22. What are the assigned resources?
23. Who manages integration?
24. Customer: who are you doing the HSE project for?
25. Where and how does the team fit within your organization structure?
26. Who is input and support will this HSE project require?
27. Fit with other Products Compliments – Cannibalizes?
28. What are the assumptions?
29. What goes into your HSE project Charter?
30. Dependent HSE projects: what HSE projects must be underway or completed before this HSE project can be successful?
31. Who is the HSE project Manager?
32. What are you striving to accomplish (measurable goal(s))?
33. For whom?

- 34. What is the purpose of the HSE project?
- 35. Why have you chosen the aim you have set forth?
- 36. How will you learn more about the process or system you are trying to improve?
- 37. Why use a HSE project charter?
- 38. Review the general mission What system will be affected by the improvement efforts?
- 39. When is a charter needed?

## 1.2 Stakeholder Register: HSE

- 40. Is your organization ready for change?
- 41. How big is the gap?
- 42. What & Why?
- 43. How should employers make voices heard?
- 44. What opportunities exist to provide communications?
- 45. Who is managing stakeholder engagement?
- 46. What are the major HSE project milestones requiring communications or providing communications opportunities?
- 47. What is the power of the stakeholder?
- 48. Who are the stakeholders?
- 49. How will reports be created?
- 50. How much influence do they have on the HSE project?
- 51. Who wants to talk about Security?

## 1.3 Stakeholder Analysis Matrix: HSE

- 52. Who will be affected by the HSE project?
- 53. Competitive advantages?
- 54. Insurmountable weaknesses?
- 55. New markets, vertical, horizontal?
- 56. Guiding question: what is the issue at stake?
- 57. How can you fill the need to show progress?
- 58. Participatory approach: how will key stakeholders participate in the HSE project?
- 59. What is the stakeholders mandate, what is mission?
- 60. How can you counter negative efforts?
- 61. Competitor intentions - various?
- 62. Do recommendations include actions to address any differential distribution of impacts?
- 63. Morale, commitment, leadership?
- 64. Has there been a similar initiative in the region?
- 65. Effects on core activities, distraction?
- 66. How are you predicting what future (work)loads



will be?

67. Inoculations or payment to receive them?

68. What do you Evaluate?

69. How much do resources cost?

70. Market developments?

71. What tools would help you communicate?

## 2.0 Planning Process Group: HSE

72. Are the necessary foundations in place to ensure the sustainability of the results of the HSE project?

73. To what extent are the visions and actions of the partners consistent or divergent with regard to the program?

74. How can you tell when you are done?

75. You did your readings, yes?

76. What good practices or successful experiences or transferable examples have been identified?

77. If task x starts two days late, what is the effect on the HSE project end date?

78. Did the program design/ implementation strategy adequately address the planning stage necessary to set up structures, hire staff etc.?

79. How can you make your needs known?

80. Product breakdown structure (pbs): what is the HSE project result or product, and how should it look like, what are its parts?

81. When developing the estimates for HSE project phases, you choose to add the individual estimates for the activities that comprise each phase. What type of estimation method are you using?

82. What is the difference between the early schedule and late schedule?

83. HSE project assessment; why did you do this HSE project?

84. Will the products created live up to the necessary quality?

85. Is the identification of the problems, inequalities and gaps, with respective causes, clear in the HSE project?

86. If you are late, will anybody notice?

87. Mitigate. what will you do to minimize the impact should a risk event occur?

88. What is a Software Development Life Cycle (SDLC)?

89. To what extent is the program helping to influence your organizations policy framework?

90. What are the different approaches to building the WBS?

91. What do they need to know about the HSE project?

## 2.1 Project Management Plan: HSE

- 92. Where does all this information come from?
- 93. Is mitigation authorized or recommended?
- 94. What data/reports/tools/etc. do your PMs need?
- 95. Are the existing and future without-plan conditions reasonable and appropriate?
- 96. Are there any Client staffing expectations?
- 97. Who is the HSE project Manager?
- 98. What is the business need?
- 99. Is the appropriate plan selected based on your organizations objectives and evaluation criteria expressed in Principles and Guidelines policies?
- 100. When is a HSE project management plan created?
- 101. What would you do differently what did not work?
- 102. Why do you manage integration?
- 103. What would you do differently?
- 104. How well are you able to manage your risk?
- 105. What goes into your HSE project Charter?

106. Is there anything you would now do differently on your HSE project based on past experience?

107. What happened during the process that you found interesting?

108. If the HSE project management plan is a comprehensive document that guides you in HSE project execution and control, then what should it NOT contain?

109. How can you best help your organization to develop consistent practices in HSE project management planning stages?

110. Is there an incremental analysis/cost effectiveness analysis of proposed mitigation features based on an approved method and using an accepted model?

## 2.2 Scope Management Plan: HSE

111. Does the title convey to the reader the essence of the HSE project?

112. Are metrics used to evaluate and manage Vendors?

113. Are you spending the right amount of money for specific tasks?

114. Describe the process for accepting the HSE project deliverables. Will the HSE project deliverables become accepted in writing?

115. What is your organizations history in doing similar activities?

116. Do you secure formal approval of changes and requirements from stakeholders?

117. What strengths do you have?

118. Organizational policies that might affect the availability of resources?

119. Is a pmo (HSE project management office) in place and provide oversight to the HSE project?

120. Is the schedule updated on a periodic basis?

121. Are you doing what you have set out to do?

122. Have the procedures for identifying variances

from estimates & adjusting the detailed work program been followed?

123. Does the implementation plan have an appropriate division of responsibilities?

124. Is stakeholder involvement adequate?

125. During what part of the PM process is the HSE project scope statement created?

126. What are the risks that could significantly affect procuring consultant staff for the HSE project?

127. Are internal HSE project status meetings held at reasonable intervals?

128. Are issues raised, assessed, actioned, and resolved in a timely and efficient manner?

129. Organizational unit (e.g., department, team, or person) who will accept responsibility for satisfactory completion of the item?

## 2.3 Requirements Management Plan: HSE

130. Who will perform the analysis?

131. Is there formal agreement on who has authority to approve a change in requirements?

132. In case of software development; Should you have a test for each code module?

133. Is the change control process documented?

134. Did you avoid subjective, flowery or non-specific statements?

135. Controlling HSE project requirements involves monitoring the status of the HSE project requirements and managing changes to the requirements. Who is responsible for monitoring and tracking the HSE project requirements?

136. Did you distinguish the scope of work the contractor(s) will be required to do?

137. Do you expect stakeholders to be cooperative?

138. What are you trying to do?

139. Who is responsible for monitoring and tracking the HSE project requirements?

140. Are actual resources expenditures versus planned



expenditures acceptable?

141. Do you have price sheets and a methodology for determining the total proposal cost?

142. How knowledgeable is the primary Stakeholder(s) in the proposed application area?

143. Who has the authority to reject HSE project requirements?

144. Has the requirements team been instructed in the Change Control process?

145. Does the HSE project have a Change Control process?

146. Is it new or replacing an existing business system or process?

147. Is the system software (non-operating system) new to the IT HSE project team?

148. Which hardware or software, related to, or as outcome of the HSE project is new to your organization?

149. After the requirements are gathered and set forth on the requirements register, they're little more than a laundry list of items. Some may be duplicates, some might conflict with others and some will be too broad or too vague to understand. Describe how the requirements will be analyzed. Who will perform the analysis?

## 2.4 Requirements Documentation: HSE

150. What is a show stopper in the requirements?

151. Is the requirement properly understood?

152. How do you know when a Requirement is accurate enough?

153. Is the origin of the requirement clearly stated?

154. Consistency. are there any requirements conflicts?

155. Are all functions required by the customer included?

156. How does the proposed HSE project contribute to the overall objectives of your organization?

157. What is your Elevator Speech?

158. Who is interacting with the system?

159. If applicable; are there issues linked with the fact that this is an offshore HSE project?

160. Who is involved?

161. What if the system wasn't implemented?

162. Where do system and software requirements

come from, what are sources?

163. How will requirements be documented and who signs off on them?

164. Does the system provide the functions which best support the customers needs?

165. What is the risk associated with the technology?

166. Have the benefits identified with the system being identified clearly?

167. What is effective documentation?

168. Can the requirements be checked?

## 2.5 Requirements Traceability Matrix: HSE

169. Is there a requirements traceability process in place?

170. What are the chronologies, contingencies, consequences, criteria?

171. How do you manage scope?

172. Why use a WBS?

173. What percentage of HSE projects are producing traceability matrices between requirements and other work products?

174. Describe the process for approving requirements so they can be added to the traceability matrix and HSE project work can be performed. Will the HSE project requirements become approved in writing?

175. How will it affect the stakeholders personally in career?

176. How small is small enough?

177. Do you have a clear understanding of all subcontracts in place?

178. What is the WBS?

179. Why do you manage scope?

180. Will you use a Requirements Traceability Matrix?

## 2.6 Project Scope Statement: HSE

181. If the scope changes, what will the impact be to your HSE project in terms of duration, cost, quality, or any other important areas of the HSE project?

182. Which risks does the HSE project focus on?

183. Is the plan under configuration management?

184. What are the possible consequences should a risk come to occur?

185. Identify how your team and you will create the HSE project scope statement and the work breakdown structure (WBS). Document how you will create the HSE project scope statement and WBS, and make sure you answer the following questions: In defining HSE project scope and the WBS, will you and your HSE project team be using methods defined by your organization, methods defined by the HSE project management office (PMO), or other methods?

186. Risks?

187. Is there a process (test plans, inspections, reviews) defined for verifying outputs for each task?

188. What is a process you might recommend to verify the accuracy of the research deliverable?

189. Have the configuration management functions been assigned?

190. Do you anticipate new stakeholders joining the HSE project over time?
191. Is there a baseline plan against which to measure progress?
192. What process would you recommend for creating the HSE project scope statement?
193. Are there adequate HSE project control systems?
194. Has the HSE project scope statement been reviewed as part of the baseline process?
195. If there are vendors, have they signed off on the HSE project Plan?
196. Elements that deal with providing the detail?
197. Is the plan for HSE project resources adequate?
198. What are the major deliverables of the HSE project?

## 2.7 Assumption and Constraint Log: HSE

- 199. Are best practices and metrics employed to identify issues, progress, performance, etc.?
- 200. Are there ways to reduce the time it takes to get something approved?
- 201. If it is out of compliance, should the process be amended or should the Plan be amended?
- 202. Does a documented HSE project organizational policy & plan (i.e. governance model) exist?
- 203. What worked well?
- 204. Is this process still needed?
- 205. How can you prevent/fix violations?
- 206. Have all necessary approvals been obtained?
- 207. Is this model reasonable?
- 208. What if failure during recovery?
- 209. Were the system requirements formally reviewed prior to initiating the design phase?
- 210. Would known impacts serve as impediments?
- 211. Does the HSE project have a formal HSE project



Plan?

212. Have you eliminated all duplicative tasks or manual efforts, where appropriate?

213. Are there procedures in place to effectively manage interdependencies with other HSE projects / systems?

214. Have the scope, objectives, costs, benefits and impacts been communicated to all involved and/or impacted stakeholders and work groups?

215. Do you know what your customers expectations are regarding this process?

216. What weaknesses do you have?

## 2.8 Work Breakdown Structure: HSE

217. Why is it useful?

218. Is it a change in scope?

219. Can you make it?

220. When does it have to be done?

221. How much detail?

222. How big is a work-package?

223. Why would you develop a Work Breakdown Structure?

224. How will you and your HSE project team define the HSE projects scope and work breakdown structure?

225. Who has to do it?

226. What has to be done?

227. What is the probability of completing the HSE project in less that xx days?

228. Do you need another level?

229. Where does it take place?

230. How many levels?

231. Is the work breakdown structure (wbs) defined and is the scope of the HSE project clear with assigned deliverable owners?

232. What is the probability that the HSE project duration will exceed xx weeks?

233. When do you stop?

## 2.9 WBS Dictionary: HSE

234. Actual cost of work performed?

235. Should you include sub-activities?

236. What is the end result of a work package?

237. Is cost and schedule performance measurement done in a consistent, systematic manner?

238. Are procedures established to prevent changes to the contract budget base other than the already stated authorized by contractual action?

239. Changes in the direct base to which overhead costs are allocated?

240. Are records maintained to show how undistributed budgets are controlled?

241. Does the contractor require sufficient detailed planning of control accounts to constrain the application of budget initially allocated for future effort to current effort?

242. Where engineering standards or other internal work measurement systems are used, is there a formal relationship between corresponding values and work package budgets?

243. Are indirect costs charged to the appropriate indirect pools and incurring organization?

244. Does the contractors system provide unit or lot costs when applicable?

245. Budgets assigned to control accounts?

246. Are authorized changes being incorporated in a timely manner?

247. Identify and isolate causes of favorable and unfavorable cost and schedule variances?

248. Are all elements of indirect expense identified to overhead cost budgets of HSE projections?

249. Are the contractors estimates of costs at completion reconcilable with cost data reported to us?

250. Authorization to proceed with all authorized work?

251. Is the entire contract planned in time-phased control accounts to the extent practicable?

252. Are estimates of costs at completion generated in a rational, consistent manner?

253. What should you drop in order to add something new?

## 2.10 Schedule Management Plan: HSE

- 254. Are the people assigned to the HSE project sufficiently qualified?
- 255. Is the HSE development and management approach described?
- 256. Timeline and milestones?
- 257. Are the activity durations realistic and at an appropriate level of detail for effective management?
- 258. Identify the amount of schedule variation that triggers a warning. What happens if a warning is triggered?
- 259. Have external dependencies been captured in the schedule?
- 260. Have the key elements of a coherent HSE project management strategy been established?
- 261. Is the critical path valid?
- 262. Have all involved HSE project stakeholders and work groups committed to the HSE project?
- 263. Are actuals compared against estimates to analyze and correct variances?
- 264. After initial schedule development, will the schedule be reviewed and validated by the HSE project team?

265. Sensitivity analysis?

266. Is there an excessive and invalid use of task constraints and relationships of leads/lags?

267. Are scheduled deliverables actually delivered?

268. How do you manage time?

269. What tools and techniques will be used to estimate activity durations?

270. Are all resource assumptions documented?

271. Are the quality tools and methods identified in the Quality Plan appropriate to the HSE project?

272. Are post milestone HSE project reviews (PMPR) conducted with your organization at least once a year?

## 2.11 Activity List: HSE

- 273. What are you counting on?
- 274. How much slack is available in the HSE project?
- 275. How do you determine the late start (LS) for each activity?
- 276. How should ongoing costs be monitored to try to keep the HSE project within budget?
- 277. Where will it be performed?
- 278. What are the critical bottleneck activities?
- 279. What is the probability the HSE project can be completed in xx weeks?
- 280. The wbs is developed as part of a joint planning session. and how do you know that you have done this right?
- 281. How detailed should a HSE project get?
- 282. What is the LF and LS for each activity?
- 283. What did not go as well?
- 284. What went well?
- 285. Are the required resources available or need to be acquired?



286. What will be performed?

287. How difficult will it be to do specific activities on this HSE project?

288. Is infrastructure setup part of your HSE project?

289. What went right?

290. Is there anything planned that does not need to be here?

291. How will it be performed?

## 2.12 Activity Attributes: HSE

292. What activity do you think you should spend the most time on?

293. How much activity detail is required?

294. Which method produces the more accurate cost assignment?

295. Are the required resources available?

296. How else could the items be grouped?

297. What conclusions/generalizations can you draw from this?

298. How difficult will it be to complete specific activities on this HSE project?

299. Where else does it apply?

300. Why?

301. Has management defined a definite timeframe for the turnaround or HSE project window?

302. Resources to accomplish the work?

303. Does your organization of the data change its meaning?

304. Have you identified the Activity Leveling Priority code value on each activity?

305. What is missing?

306. Would you consider either of corresponding activities an outlier?

307. How difficult will it be to do specific activities on this HSE project?

308. Can you re-assign any activities to another resource to resolve an over-allocation?

309. Activity: fair or not fair?

## 2.13 Milestone List: HSE

310. Sustaining internal capabilities?

311. Level of the Innovation?

312. Describe the concept of the technology, product or service that will be or has been developed. How will it be used?

313. Timescales, deadlines and pressures?

314. What specific improvements did you make to the HSE project proposal since the previous time?

315. Identify critical paths (one or more) and which activities are on the critical path?

316. Reliability of data, plan predictability?

317. It is to be a narrative text providing the crucial aspects of your HSE project proposal answering what, who, how, when and where?

318. Gaps in capabilities?

319. Information and research?

320. Environmental effects?

321. How soon can the activity finish?

322. Who will manage the HSE project on a day-to-day basis?

323. Describe your organizations strengths and core competencies. What factors will make your organization succeed?

324. How late can the activity finish?

325. Own known vulnerabilities?

326. How late can the activity start?

327. Which path is the critical path?

## 2.14 Network Diagram: HSE

328. Why must you schedule milestones, such as reviews, throughout the HSE project?

329. What job or jobs could run concurrently?

330. Where do schedules come from?

331. What activities must follow this activity?

332. What can be done concurrently?

333. Are you on time?

334. What is the probability of completing the HSE project in less than xx days?

335. What are the Key Success Factors?

336. What activities must occur simultaneously with this activity?

337. What are the tools?

338. What is the completion time?

339. Exercise: what is the probability that the HSE project duration will exceed xx weeks?

340. What to do and When?

341. What job or jobs precede it?

342. What activity must be completed immediately before this activity can start?

343. What controls the start and finish of a job?

344. If a current contract exists, can you provide the vendor name, contract start, and contract expiration date?

## 2.15 Activity Resource Requirements: HSE

345. Anything else?

346. Time for overtime?

347. Other support in specific areas?

348. Are there unresolved issues that need to be addressed?

349. What are constraints that you might find during the Human Resource Planning process?

350. What is the Work Plan Standard?

351. How do you handle petty cash?

352. Do you use tools like decomposition and rolling-wave planning to produce the activity list and other outputs?

353. When does monitoring begin?

354. Organizational Applicability?

355. How many signatures do you require on a check and does this match what is in your policy and procedures?

356. Which logical relationship does the PDM use most often?



357. Why do you do that?

## 2.16 Resource Breakdown Structure: HSE

- 358. What is HSE project communication management?
- 359. Which resources should be in the resource pool?
- 360. Any changes from stakeholders?
- 361. What is the difference between % Complete and % work?
- 362. Who will use the system?
- 363. What defines a successful HSE project?
- 364. Goals for the HSE project. What is each stakeholders desired outcome for the HSE project?
- 365. Who is allowed to see what data about which resources?
- 366. How can this help you with team building?
- 367. What is the purpose of assigning and documenting responsibility?
- 368. What is the primary purpose of the human resource plan?
- 369. Changes based on input from stakeholders?

370. Why do you do it?

371. How difficult will it be to do specific activities on this HSE project?

372. Is predictive resource analysis being done?

## 2.17 Activity Duration Estimates: HSE

373. Are the causes of all variances identified?

374. Calculate the expected duration for an activity that has a most likely time of 3, a pessimistic time of 10, and an optimistic time of 2?

375. Are contingency plans created to prepare for risk events to occur?

376. Is the cost performance monitored to identify variances from the plan?

377. Are adjustments implemented to correct or prevent defects?

378. What are key inputs and outputs of the software?

379. What type of information goes in a quality assurance plan?

380. Research recruiting and retention strategies at three different companies. What distinguishes one organization from another in this area?

381. What are the options you found to help people prepare for the exam?

382. Describe a HSE project that suffered from scope creep. Could it have been avoided?

383. (Cpi), and schedule performance index (spi) for the HSE project?

384. What is the difference between conceptual, application, and evaluative questions?
385. See what went wrong?
386. Who will provide training for the new application?
387. Which is a benefit of an analogous HSE project estimate?
388. Does the software appear easy to learn?
389. Do scope statements include the HSE project objectives and expected deliverables?
390. Are operational definitions created to identify quality measurement criteria for specific activities?
391. Are reward and recognition systems defined to promote or reinforce desired behavior?

## 2.18 Duration Estimating Worksheet: HSE

392. When, then?

393. What utility impacts are there?

394. For other activities, how much delay can be tolerated?

395. Is a construction detail attached (to aid in explanation)?

396. When do the individual activities need to start and finish?

397. How should ongoing costs be monitored to try to keep the HSE project within budget?

398. What is next?

399. Does the HSE project provide innovative ways for stakeholders to overcome obstacles or deliver better outcomes?

400. What is an Average HSE project?

401. Done before proceeding with this activity or what can be done concurrently?

402. What questions do you have?

403. Do any colleagues have experience with your

organization and/or RFPs?

404. What is cost and HSE project cost management?

405. What is the total time required to complete the HSE project if no delays occur?

406. Is the HSE project responsive to community need?

407. Small or large HSE project?

408. Why estimate time and cost?

409. Can the HSE project be constructed as planned?

410. What info is needed?

## 2.19 Project Schedule: HSE

- 411. How do you manage HSE project Risk?
- 412. How can you address that situation?
- 413. What is risk?
- 414. Is infrastructure setup part of your HSE project?
- 415. What does that mean?
- 416. How do you know that you have done this right?
- 417. Are there activities that came from a template or previous HSE project that are not applicable on this phase of this HSE project?
- 418. How detailed should a HSE project get?
- 419. Your best shot for providing estimations how complex/how much work does the activity require?
- 420. Does the condition or event threaten the HSE projects objectives in any ways?
- 421. How closely did the initial HSE project Schedule compare with the actual schedule?
- 422. Schedule/cost recovery?
- 423. Meet requirements?
- 424. What documents, if any, will the subcontractor



provide (eg HSE project schedule, quality plan etc)?

425. How can you shorten the schedule?

426. What is the most mis-scheduled part of process?

427. Did the final product meet or exceed user expectations?

## 2.20 Cost Management Plan: HSE

- 428. Are change requests logged and managed?
- 429. Has the budget been baselined?
- 430. How does the proposed individual meet each requirement?
- 431. Has the HSE project scope been baselined?
- 432. Are updated HSE project time & resource estimates reasonable based on the current HSE project stage?
- 433. Has the HSE project manager been identified?
- 434. Risk rating?
- 435. Is there an on-going process in place to monitor HSE project risks?
- 436. Are changes in deliverable commitments agreed to by all affected groups & individuals?
- 437. Is there an approved case?
- 438. Was the HSE project schedule reviewed by all stakeholders and formally accepted?
- 439. How do you manage cost?
- 440. What will be the split of responsibilities of progress measurement and controls among the

owner, contractor, subcontractors, and vendors?

441. Will the earned value reporting interface between time and cost management?

442. Is there an issues management plan in place?

443. Have all unresolved risks been documented?

444. Has a resource management plan been created?

445. Are tasks tracked by hours?

446. Are enough systems & user personnel assigned to the HSE project?

447. Was your organizations estimating methodology being used and followed?

## 2.21 Activity Cost Estimates: HSE

- 448. How do you fund change orders?
- 449. What is the activity recast of the budget?
- 450. How do you change activities?
- 451. Will you use any tools, such as HSE project management software, to assist in capturing Earned Value metrics?
- 452. How Award?
- 453. What areas were overlooked on this HSE project?
- 454. Are cost subtotals needed?
- 455. Are data needed on characteristics of care?
- 456. What makes a good activity description?
- 457. Does the estimator have experience?
- 458. What cost data should be used to estimate costs during the 2-year follow-up period?
- 459. Were the costs or charges reasonable?
- 460. What is your organizations history in doing similar tasks?
- 461. How and when do you enter into HSE project Procurement Management?

462. Where can you get activity reports?

463. Why do you manage cost?

464. Were sponsors and decision makers available when needed outside regularly scheduled meetings?

465. Does the activity serve a common type of customer?

## 2.22 Cost Estimating Worksheet: HSE

466. What will others want?

467. What is the estimated labor cost today based upon this information?

468. Ask: are others positioned to know, are others credible, and will others cooperate?

469. Does the HSE project provide innovative ways for stakeholders to overcome obstacles or deliver better outcomes?

470. What additional HSE project(s) could be initiated as a result of this HSE project?

471. What is the purpose of estimating?

472. Is it feasible to establish a control group arrangement?

473. What costs are to be estimated?

474. Who is best positioned to know and assist in identifying corresponding factors?

475. Will the HSE project collaborate with the local community and leverage resources?

476. What happens to any remaining funds not used?

477. Identify the timeframe necessary to monitor progress and collect data to determine how the

selected measure has changed?

478. Can a trend be established from historical performance data on the selected measure and are the criteria for using trend analysis or forecasting methods met?

479. Value pocket identification & quantification what are value pockets?

480. Is the HSE project responsive to community need?

481. What can be included?

482. How will the results be shared and to whom?

## 2.23 Cost Baseline: HSE

- 483. Is the cr within HSE project scope?
- 484. What is the consequence?
- 485. When should cost estimates be developed?
- 486. How will cost estimates be used?
- 487. What do you want to measure ?
- 488. Have all approved changes to the schedule baseline been identified and impact on the HSE project documented?
- 489. Does a process exist for establishing a cost baseline to measure HSE project performance?
- 490. What deliverables come first?
- 491. Is there anything unique in this HSE projects scope statement that will affect resources?
- 492. How fast?
- 493. Are you meeting with your team regularly?
- 494. Have the lessons learned been filed with the HSE project Management Office?
- 495. Are you asking management for something as a result of this update?



496. Have all the product or service deliverables been accepted by the customer?

497. For what purpose ?

498. Will the HSE project fail if the change request is not executed?

499. Who will use corresponding metrics ?

## 2.24 Quality Management Plan: HSE

500. Is the amount of effort justified by the anticipated value of forming a new process?

501. Have all stakeholders been identified?

502. What key performance indicators does your organization use to measure, manage, and improve key processes?

503. How does your organization establish and maintain customer relationships?

504. What are the established criteria that sampling / testing data are compared against?

505. How does your organization determine the requirements and product/service features important to customers?

506. How relevant is this attribute to this HSE project or audit?

507. Does the program use other agents to collect samples?

508. How are senior leaders, employees, and your organization involved in supporting the community?

509. You know what your customers expectations are regarding this process?

510. Are there processes in place to ensure internal

consistency between the source code components?

511. What would be the next steps or what else should you do at this point?

512. How do you decide what information needs to be recorded?

513. Were there any deficiencies / issues identified in the prior years self-assessment?

514. How does the material compare to a regulatory threshold?

515. How does your organization perform analyzes to assess overall organizational performance and set priorities?

516. How does your organization manage work to promote cooperation, individual initiative, innovation, flexibility, communications, and knowledge/skill sharing across work units?

517. How long do you retain data?

518. How are people conducting sampling trained?

## 2.25 Quality Metrics: HSE

519. Did the team meet the HSE project success criteria documented in the Quality Metrics Matrix?

520. Are quality metrics defined?

521. Is a risk containment plan in place?

522. What happens if you get an abnormal result?

523. How does one achieve stability?

524. Is there alignment within your organization on definitions?

525. Who notifies stakeholders of normal and abnormal results?

526. Why is now the time for quality metrics?

527. Subjective quality component: customer satisfaction, how do you measure it?

528. Which report did you use to create the data you are submitting?

529. Where is quality now?

530. Are there any open risk issues?

531. Which are the right metrics to use?

532. Have alternatives been defined in the event that

failure occurs?

533. Are interface issues coordinated?

534. What percentage are outcome-based?

535. What group is empowered to define quality requirements?

536. Are documents on hand to provide explanations of privacy and confidentiality?

537. How are requirements conflicts resolved?

## 2.26 Process Improvement Plan: HSE

538. How do you manage quality?

539. What personnel are the coaches for your initiative?

540. Why quality management?

541. What is the return on investment?

542. What actions are needed to address the problems and achieve the goals?

543. Are there forms and procedures to collect and record the data?

544. If a process improvement framework is being used, which elements will help the problems and goals listed?

545. What personnel are the champions for the initiative?

546. Has a process guide to collect the data been developed?

547. Have the supporting tools been developed or acquired?

548. Does your process ensure quality?

549. Are you making progress on the goals?

550. What lessons have you learned so far?

551. Where do you want to be?

552. Are you following the quality standards?

553. What is the test-cycle concept?

554. Has the time line required to move measurement results from the points of collection to databases or users been established?

555. Are you making progress on your improvement plan?

556. Have the frequency of collection and the points in the process where measurements will be made been determined?

## 2.27 Responsibility Assignment Matrix: HSE

557. Evaluate the performance of operating organizations?

558. Is it safe to say you can handle more work or that some tasks you are supposed to do aren't worth doing?

559. Does the HSE project need to be analyzed further to uncover additional responsibilities?

560. Competencies and craftsmanship – what competencies are necessary and what level?

561. How many people do you need?

562. What will the work cost?

563. How do you manage remotely to staff in other Divisions?

564. When performing is split among two or more roles, is the work clearly defined so that the efforts are coordinated and the communication is clear?

565. Ideas for developing soft skills at your organization?

566. Is work properly classified as measured effort, LOE, or apportioned effort and appropriately separated?



567. What cost control tool do many experts say is crucial to HSE project management?
568. Are all elements of indirect expense identified to overhead cost budgets of HSE projections?
569. What do you do when people do not respond?
570. Why cost benefit analysis?
571. Are indirect costs accumulated for comparison with the corresponding budgets?
572. The anticipated business volume?
573. What materials and procurements needed?
574. Not any rs, as, or cs: if an identified role is only informed, should others be eliminated from the matrix?

## 2.28 Roles and Responsibilities: HSE

575. Key conclusions and recommendations: Are conclusions and recommendations relevant and acceptable?

576. Are your budgets supportive of a culture of quality data?

577. What areas of supervision are challenging for you?

578. Once the responsibilities are defined for the HSE project, have the deliverables, roles and responsibilities been clearly communicated to every participant?

579. What specific behaviors did you observe?

580. Was the expectation clearly communicated?

581. How well did the HSE project Team understand the expectations of specific roles and responsibilities?

582. What should you highlight for improvement?

583. Who is responsible for each task?

584. Accountabilities: what are the roles and responsibilities of individual team members?

585. Are your policies supportive of a culture of quality data?

586. What is working well within your organizations performance management system?

587. What expectations were NOT met?

588. What should you do now to ensure that you are meeting all expectations of your current position?

589. Is the data complete?

590. What should you do now to ensure that you are exceeding expectations and excelling in your current position?

591. How is your work-life balance?

592. Attainable / achievable: the goal is attainable; can you actually accomplish the goal?

## 2.29 Human Resource Management

### Plan: HSE

593. Is there general agreement & acceptance of the current status and progress of the HSE project?

594. List roles. what commitments have been made?

595. Where is your organization headed?

596. Personnel with expertise?

597. Is an industry recognized support tool(s) being used for HSE project scheduling & tracking?

598. Is your organization heading towards expansion, outsourcing of certain talents or making cut-backs to save money?

599. How well does your organization communicate?

600. Are parking lot items captured?

601. Is this HSE project carried out in partnership with other groups/organizations?

602. Have process improvement efforts been completed before requirements efforts begin?

603. Have activity relationships and interdependencies within tasks been adequately identified?

604. Is HSE project status reviewed with the steering and executive teams at appropriate intervals?

605. Is your organization certified as a supplier, wholesaler, regular dealer, or manufacturer of corresponding products/supplies?

606. Has a provision been made to reassess HSE project risks at various HSE project stages?

607. Is the communication plan being followed?

608. Is PERT / critical path or equivalent methodology being used?

## 2.30 Communications Management

### Plan: HSE

609. Do you feel a register helps?

610. Is there an important stakeholder who is actively opposed and will not receive messages?

611. How do you manage communications?

612. How is this initiative related to other portfolios, programs, or HSE projects?

613. What is HSE project communications management?

614. What steps can you take for a positive relationship?

615. What approaches do you use?

616. Why manage stakeholders?

617. Conflict resolution -which method when?

618. What help do you and your team need from the stakeholder?

619. Who were proponents/opponents?

620. How will the person responsible for executing the communication item be notified?

621. Why do you manage communications?

622. Do you have members of your team responsible for certain stakeholders?

623. Are the stakeholders getting the information others need, are others consulted, are concerns addressed?

624. Which stakeholders are thought leaders, influences, or early adopters?

625. Can you think of other people who might have concerns or interests?

626. Who is the stakeholder?

627. Is the stakeholder role recognized by your organization?

628. What does the stakeholder need from the team?

## 2.31 Risk Management Plan: HSE

629. Market risk -will the new service or product be useful to your organization or marketable to others?

630. Maximize short-term return on investment?

631. Minimize cost and financial risk?

632. Premium on reliability of product?

633. Are the best people available?

634. Can it be changed quickly?

635. Do you have a mechanism for managing change?

636. Why do you want risk management?

637. What will drive change?

638. What would you do?

639. Are there new risks that mitigation strategies might introduce?

640. Are certain activities taking a long time to complete?

641. Is the process supported by tools?

642. Are you working on the right risks?

643. Which risks should get the attention?



644. How do you manage HSE project Risk?

645. Are formal technical reviews part of this process?

646. Are you on schedule?

647. Is the customer technically sophisticated in the product area?

648. What is the impact to the HSE project if the item is not resolved in a timely fashion?

## 2.32 Risk Register: HSE

649. Are there any knock-on effects/impact on any of the other areas?

650. What will be done?

651. What further options might be available for responding to the risk?

652. What can be done about it?

653. Does the evidence highlight any areas to advance opportunities or foster good relations. If yes what steps will be taken?

654. Contingency actions - planned actions to reduce the immediate seriousness of the risk when it does occur. What should you do when?

655. How is a Community Risk Register created?

656. When would you develop a risk register?

657. Amongst the action plans and recommendations that you have to introduce are there some that could stop or delay the overall program?

658. How are risks graded?

659. Risk probability and impact: how will the probabilities and impacts of risk items be assessed?

660. Assume the event happens, what is the Most

Likely impact?

661. What is the reason for current performance gaps and do the risks and opportunities identified previously account for this?

662. What are your key risks/show istoppers and what is being done to manage them?

663. What should you do now?

664. Can the likelihood and impact of failing to achieve corresponding recommendations and action plans be assessed?

665. How well are risks controlled?

666. Who is going to do it?

667. Risk categories: what are the main categories of risks that should be addressed on this HSE project?

## **2.33 Probability and Impact Assessment: HSE**

668. How are the local factors going to affect the absorption?

669. What should be the level of coordination?

670. What can you do to minimize the impact if it does?

671. What should be the level of difficulty in handling the technology?

672. Has the need for the HSE project been properly established?

673. Are the software tools integrated with each other?

674. What will be cost of redeployment of personnel?

675. Workarounds are determined during which step of risk management?

676. Is it necessary to deeply assess all HSE project risks?

677. How is the risk management process used in practice?

678. Who will be in command to monitor and control the performance of the consortium members

(consortium leader/client)?

679. How much is the probability of a risk occurring?

680. What new technologies are being explored in the same area?

681. How would you assess the risk management process in the HSE project?

682. How do risks change during the HSE projects life cycle?

683. Will there be an increase in the political conservatism?

684. Does the software interface with new or unproven hardware or unproven vendor products?

685. What risks are necessary to achieve success?

686. How well is the risk understood?

## 2.34 Probability and Impact Matrix: HSE

- 687. Could others have been better mitigated?
- 688. What changes in the regulation are forthcoming?
- 689. What lifestyle shifts might occur in society?
- 690. What are the methods to deal with risks?
- 691. Can you handle the investment risk?
- 692. During HSE project executing, a team member identifies a risk that is not in the risk register. What should you do?
- 693. To what extent is the chosen technology maturing?
- 694. What is HSE project risk management?
- 695. Do requirements demand the use of new analysis, design, or testing methods?
- 696. Should the risk be taken at all?
- 697. Are HSE project requirements stable?
- 698. Are the risk data timely and relevant?
- 699. How are you working with risks?

700. Sensitivity analysis -which risks will have the most impact on the HSE project?

701. Why do you need to manage HSE project Risk?

702. Are staff committed for the duration of the HSE project?

703. Lay ground work for future returns?

704. What are data sources?

## 2.35 Risk Data Sheet: HSE

705. What is the chance that it will happen?

706. What do you know?

707. What is the likelihood of it happening?

708. Type of risk identified?

709. What do people affected think about the need for, and practicality of preventive measures?

710. Who has a vested interest in how you perform as your organization (our stakeholders)?

711. Has a sensitivity analysis been carried out?

712. Risk of what?

713. What were the Causes that contributed?

714. What are you weak at and therefore need to do better?

715. During work activities could hazards exist?

716. Are new hazards created?

717. What can happen?

718. Do effective diagnostic tests exist?

719. What are the main threats to your existence?



720. How can it happen?

721. How can hazards be reduced?

722. What will be the consequences if the risk happens?

723. Is the data sufficiently specified in terms of the type of failure being analyzed, and its frequency or probability?

724. What is the environment within which you operate (social trends, economic, community values, broad based participation, national directions etc.)?

## 2.36 Procurement Management Plan: HSE

725. Specific - is the objective clear in terms of what, how, when, and where the situation will be changed?

726. What are your quality assurance overheads?

727. Are meeting objectives identified for each meeting?

728. Were HSE project team members involved in the development of activity & task decomposition?

729. What is the last item a HSE project manager must do to finalize HSE project close-out?

730. Are staff skills known and available for each task?

731. Has the schedule been baselined?

732. Are action items captured and managed?

733. What types of contracts will be used?

734. Are mitigation strategies identified?

735. Does the schedule include HSE project management time and change request analysis time?

736. Is there general agreement & acceptance of the current status and progress of the HSE project?

737. What were things that you did very well and want to do the same again on the next HSE project?

738. Is an industry recognized mechanized support tool(s) being used for HSE project scheduling & tracking?

739. Is there an on-going process in place to monitor HSE project risks?

740. Have stakeholder accountabilities & responsibilities been clearly defined?

741. Are estimating assumptions and constraints captured?

## 2.37 Source Selection Criteria: HSE

742. Has all proposal data been loaded?

743. When should debriefings be held and how should they be scheduled?

744. Are responses to considerations adequate?

745. Does the evaluation of any change include an impact analysis; how will the change affect the scope, time, cost, and quality of the goods or services being provided?

746. When and what information can be considered with offerors regarding past performance?

747. Are considerations anticipated?

748. Does your documentation identify why the team concurs or differs with reported performance from past performance report (CPARs, questionnaire responses, etc.)?

749. What is the role of counsel in the procurement process?

750. Comparison of each offers prices to the estimated prices -are there significant differences?

751. Have all evaluators been trained?

752. What should be considered when developing evaluation standards?

753. Which contract type places the most risk on the seller?

754. What past performance information should be requested?

755. What are the requirements for publicizing a RFP?

756. What instructions should be provided regarding oral presentations?

757. What benefits are accrued from issuing a DRFP in advance of issuing a final RFP?

758. Are there any common areas of weaknesses or deficiencies in the proposals in the competitive range?

759. Do you have a plan to document consensus results including disposition of any disagreement by individual evaluators?

760. What can not be disclosed?

761. How should oral presentations be evaluated?

## 2.38 Stakeholder Management Plan: HSE

762. Has a sponsor been identified?

763. Will all outputs delivered by the HSE project follow the same process?

764. Is the HSE project sponsor clearly communicating the business case or rationale for why this HSE project is needed?

765. Have the procedures for identifying budget variances been followed?

766. What records are required (eg purchase orders, agreements)?

767. What is the primary function of the Activity Decomposition Decision Tree?

768. How are new requirements or changes to requirements identified?

769. Who might be involved in developing a charter?

770. Was trending evident between reviews?

771. How many HSE project staff does this specific process affect?

772. What is meant by managing the triple constraint?

773. Are all vendor contracts closed out?

774. Have the key functions and capabilities been defined and assigned to each release or iteration?

775. Were HSE project team members involved in detailed estimating and scheduling?

776. Does the HSE project have a Statement of Work?

777. Who is responsible for accepting the reports produced by the process?

## 2.39 Change Management Plan: HSE

778. How does the principle of senders and receivers make the HSE project communications effort more complex?

779. Who should be involved in developing a change management strategy?

780. Do the proposed users have access to the appropriate documentation?

781. What skills, education, knowledge, or work experiences should the resources have for each identified competency?

782. What are the major changes to processes?

783. Is there a software application relevant to this deliverable?

784. Is there a need for new relationships to be built?

785. Who might be able to help you the most?

786. What work practices will be affected?

787. What are the needs, priorities and special interests of the audience?

788. Who will be the change levers?

789. Which relationships will change?



790. Has an information & communications plan been developed?

791. Has the training provider been established?

792. Impact of systems implementation on organization change?

793. Who will do the training?

794. Has the training co-ordinator been provided with the training details and put in place the necessary arrangements?

795. What are the current methods of sharing information and do there need to be new ones developed?

796. What are the key change management success metrics?

### 3.0 Executing Process Group: HSE

797. Measurable - are the targets measurable?

798. Could a new application negatively affect the current IT infrastructure?

799. If a risk event occurs, what will you do?

800. Is the HSE project making progress in helping to achieve the set results?

801. Are the necessary foundations in place to ensure the sustainability of the results of the programme?

802. How well did the chosen processes fit the needs of the HSE project?

803. How does a HSE project life cycle differ from a product life cycle?

804. What is involved in the solicitation process?

805. In what way has the program come up with innovative measures for problem-solving?

806. Will additional funds be needed for hardware or software?

807. What are deliverables of your HSE project?

808. What are the challenges HSE project teams face?

809. How could you control progress of your HSE

project?

810. Do the products created live up to the necessary quality?

811. What HSE projects and services are in the portfolio of your organization?

812. How do you control progress of your HSE project?

813. Does the case present a realistic scenario?

814. How do you enter durations, link tasks, and view critical path information?

815. When is the appropriate time to bring the scorecard to Board meetings?

## 3.1 Team Member Status Report: HSE

816. How can you make it practical?

817. Does the product, good, or service already exist within your organization?

818. Are the products of your organizations HSE projects meeting customers objectives?

819. How does this product, good, or service meet the needs of the HSE project and your organization as a whole?

820. How it is to be done?

821. Do you have an Enterprise HSE project Management Office (EPMO)?

822. What is to be done?

823. Are your organizations HSE projects more successful over time?

824. Will the staff do training or is that done by a third party?

825. How much risk is involved?

826. Does every department have to have a HSE project Manager on staff?

827. Does your organization have the means (staff, money, contract, etc.) to produce or to acquire the

product, good, or service?

828. How will resource planning be done?

829. Are the attitudes of staff regarding HSE project work improving?

830. Why is it to be done?

831. What specific interest groups do you have in place?

832. The problem with Reward & Recognition Programs is that the truly deserving people all too often get left out. How can you make it practical?

833. When a teams productivity and success depend on collaboration and the efficient flow of information, what generally fails them?

834. Is there evidence that staff is taking a more professional approach toward management of your organizations HSE projects?

## 3.2 Change Request: HSE

835. What type of changes does change control take into account?

836. How to get changes (code) out in a timely manner?

837. How can changes be graded?

838. Change request coordination ?

839. How well do experienced software developers predict software change?

840. How is the change documented (format, content, storage)?

841. Has a formal technical review been conducted to assess technical correctness?

842. Can you answer what happened, who did it, when did it happen, and what else will be affected?

843. What are the basic mechanics of the Change Advisory Board (CAB)?

844. Who is included in the change control team?

845. Who is responsible for the implementation and monitoring of all measures?

846. Who can suggest changes?

847. Will the change use memory to the extent that other functions will be not have sufficient memory to operate effectively?

848. Customer acceptance plan how will the customer verify the change has been implemented successfully?

849. Are there requirements attributes that are strongly related to the occurrence of defects and failures?

850. How are changes graded and who is responsible for the rating?

851. Should a more thorough impact analysis be conducted?

852. How is quality being addressed on the HSE project?

853. For which areas does this operating procedure apply?

854. Is it feasible to use requirements attributes as predictors of reliability?

### 3.3 Change Log: HSE

855. Is this a mandatory replacement?

856. Do the described changes impact on the integrity or security of the system?

857. When was the request approved?

858. Does the suggested change request represent a desired enhancement to the products functionality?

859. Is the requested change request a result of changes in other HSE project(s)?

860. How does this change affect scope?

861. Who initiated the change request?

862. Is the change backward compatible without limitations?

863. Is the change request within HSE project scope?

864. How does this relate to the standards developed for specific business processes?

865. Is the change request open, closed or pending?

866. Where do changes come from?

867. Is the submitted change a new change or a modification of a previously approved change?



868. How does this change affect the timeline of the schedule?

869. Does the suggested change request seem to represent a necessary enhancement to the product?

870. Will the HSE project fail if the change request is not executed?

871. When was the request submitted?

## 3.4 Decision Log: HSE

872. What is the average size of your matters in an applicable measurement?

873. It becomes critical to track and periodically revisit both operational effectiveness; Are you noticing all that you need to, and are you interpreting what you see effectively?

874. Who is the decisionmaker?

875. Does anything need to be adjusted?

876. How does the use a Decision Support System influence the strategies/tactics or costs?

877. Which variables make a critical difference?

878. How do you know when you are achieving it?

879. Adversarial environment. is your opponent open to a non-traditional workflow, or will it likely challenge anything you do?

880. Is everything working as expected?

881. What was the rationale for the decision?

882. What alternatives/risks were considered?

883. At what point in time does loss become unacceptable?

884. How does an increasing emphasis on cost containment influence the strategies and tactics used?

885. Who will be given a copy of this document and where will it be kept?

886. Linked to original objective?

887. With whom was the decision shared or considered?

888. How does provision of information, both in terms of content and presentation, influence acceptance of alternative strategies?

889. How do you define success?

890. Behaviors; what are guidelines that the team has identified that will assist them with getting the most out of team meetings?

891. How consolidated and comprehensive a story can you tell by capturing currently available incident data in a central location and through a log of key decisions during an incident?

### 3.5 Quality Audit: HSE

892. How does your organization know that its system for ensuring that its training activities are appropriately resourced and support is appropriately effective and constructive?

893. How does your organization know that its research planning and management systems are appropriately effective and constructive in enabling quality research outcomes?

894. How does your organization know that the support for its staff is appropriately effective and constructive?

895. How does your organization know that its staff support services planning and management systems are appropriately effective and constructive?

896. Is the reports overall tone appropriate?

897. Are multiple statements on the same issue consistent with each other?

898. How does your organization know that its processes for managing severance are appropriately effective, constructive and fair?

899. How does your organization know that its staff placements are appropriately effective and constructive in relation to program-related learning outcomes?

900. If your organization thinks it is doing something well, can it prove this?

901. Is there a risk that information provided by management may not always be reliable?

902. Have the risks associated with the intentions been identified, analyzed and appropriate responses developed?

903. Are there sufficient personnel having the necessary education, background, training, and experience to assure that all operations are correctly performed?

904. Is there a written corporate quality policy?

905. How does your organization know that its methods are appropriately effective and constructive?

906. Is your organizations resource allocation system properly aligned with its collection of intentions?

907. Do prior clients have a positive opinion of your organization?

908. Are all areas associated with the storage and reconditioning of devices clean, free of rubbish, adequately ventilated and in good repair?

909. How does your organization know that its financial management system is appropriately effective and constructive?

910. Are training programs documented?

## 3.6 Team Directory: HSE

911. Who will write the meeting minutes and distribute?

912. Is construction on schedule?

913. Does a HSE project team directory list all resources assigned to the HSE project?

914. Decisions: is the most suitable form of contract being used?

915. Days from the time the issue is identified?

916. Process decisions: are all start-up, turn over and close out requirements of the contract satisfied?

917. How do unidentified risks impact the outcome of the HSE project?

918. Who should receive information (all stakeholders)?

919. Decisions: what could be done better to improve the quality of the constructed product?

920. How does the team resolve conflicts and ensure tasks are completed?

921. Who are the Team Members?

922. Why is the work necessary?

923. Process decisions: are contractors adequately prosecuting the work?

924. Who is the Sponsor?

925. Who will be the stakeholders on your next HSE project?

926. Process decisions: do job conditions warrant additional actions to collect job information and document on-site activity?

927. When will you produce deliverables?

928. Who are your stakeholders (customers, sponsors, end users, team members)?

929. Where should the information be distributed?

## 3.7 Team Operating Agreement: HSE

930. Have you set the goals and objectives of the team?

931. Does your team need access to all documents and information at all times?

932. Do you call or email participants to ensure understanding, follow-through and commitment to the meeting outcomes?

933. What is your unique contribution to your organization?

934. Are there more than two national cultures represented by your team?

935. Do you solicit member feedback about meetings and what would make them better?

936. What is the number of cases currently teamed?

937. Do you vary your voice pace, tone and pitch to engage participants and gain involvement?

938. What is culture?

939. Do you determine the meeting length and time of day?

940. Did you recap the meeting purpose, time, and expectations?



941. Conflict resolution: how will disputes and other conflicts be mediated or resolved?

942. Did you prepare participants for the next meeting?

943. How will you divide work equitably?

944. What are some potential sources of conflict among team members?

945. Do you post meeting notes and the recording (if used) and notify participants?

946. Are there the right people on your team?

947. What resources can be provided for the team in terms of equipment, space, time for training, protected time and space for meetings, and travel allowances?

948. What is group supervision?

949. Are there more than two native languages represented by your team?

## 3.8 Team Performance Assessment: HSE

950. Is there a particular method of data analysis that you would recommend as a means of demonstrating that method variance is not of great concern for a given dataset?

951. When a reviewer complains about method variance, what is the essence of the complaint?

952. Effects of crew composition on crew performance: Does the whole equal the sum of its parts?

953. What do you think is the most constructive thing that could be done now to resolve considerations and disputes about method variance?

954. How do you recognize and praise members for contributions?

955. How hard do you try to make a good selection?

956. To what degree can all members engage in open and interactive considerations?

957. What makes opportunities more or less obvious?

958. To what degree is the team cognizant of small wins to be celebrated along the way?

959. To what degree are the goals realistic?

960. To what degree are the relative importance and priority of the goals clear to all team members?

961. How does HSE project termination impact HSE project team members?

962. To what degree do the goals specify concrete team work products?

963. To what degree do all members feel responsible for all agreed-upon measures?

964. To what degree do team members understand one another's roles and skills?

965. If you have criticized someone's work for method variance in your role as reviewer, what was the circumstance?

966. To what degree will the team ensure that all members equitably share the work essential to the success of the team?

967. To what degree can team members meet frequently enough to accomplish the team's ends?

968. To what degree can the team ensure that all members are individually and jointly accountable for the team's purpose, goals, approach, and work-products?

969. To what degree can team members vigorously define the team's purpose in considerations with others who are not part of the functioning team?

## 3.9 Team Member Performance Assessment: HSE

970. Does adaptive training work?

971. To what degree do team members feel that the purpose of the team is important, if not exciting?

972. What changes do you need to make to align practices with beliefs?

973. Where can team members go for more detailed information on performance measurement and assessment?

974. How is assessment information achieved, stored?

975. Who receives a benchmark visit?

976. To what degree is there a sense that only the team can succeed?

977. Why do performance reviews?

978. How was the determination made for which training platforms would be used (i.e., media selection)?

979. To what degree can the team measure progress against specific goals?

980. What does collaboration look like?

981. What happens if a team member disagrees with the Job Expectations?

982. Has the appropriate access to relevant data and analysis capability been granted?

983. What kinds of performance factors / elements do you use?

984. How are performance measures and associated incentives developed?

985. What are best practices in use for the performance measurement system?

986. How do you implement Cost Reduction?

987. Are the goals SMART ?

988. How will they be formed?

989. Goals met?

## 3.10 Issue Log: HSE

- 990. What is the stakeholders political influence?
- 991. What are the stakeholders interrelationships?
- 992. What is the impact on the risks?
- 993. What help do you and your team need from the stakeholders?
- 994. Which team member will work with each stakeholder?
- 995. In your work, how much time is spent on stakeholder identification?
- 996. Who is involved as you identify stakeholders?
- 997. Do you prepare stakeholder engagement plans?
- 998. Can an impact cause deviation beyond team, stage or HSE project tolerances?
- 999. Why multiple evaluators?
- 1000. What is the status of the issue?
- 1001. What is a Stakeholder?
- 1002. How often do you engage with stakeholders?
- 1003. Are there common objectives between the team and the stakeholder?

1004. What is the impact on the Business Case?

1005. Is the issue log kept in a safe place?

## 4.0 Monitoring and Controlling

### Process Group: HSE

1006. Are the services being delivered?

1007. What departments are involved in its daily operation?

1008. How well did the chosen processes fit the needs of the HSE project?

1009. Who needs to be involved in the planning?

1010. Who are the HSE project stakeholders?

1011. Overall, how does the program function to serve the clients?

1012. When will the HSE project be done?

1013. Accuracy: what design will lead to accurate information?

1014. What resources (both financial and non-financial) are available/needed?

1015. What were things that you need to improve?

1016. What do they need to know about the HSE project?

1017. Where is the Risk in the HSE project?



1018. Is progress on outcomes due to your program?

1019. Is there sufficient time allotted between the general system design and the detailed system design phases?

1020. How well did the team follow the chosen processes?

## 4.1 Project Performance Report: HSE

1021. To what degree does the funding match the requirement?

1022. To what degree does the teams purpose contain themes that are particularly meaningful and memorable?

1023. To what degree will new and supplemental skills be introduced as the need is recognized?

1024. To what degree are fresh input and perspectives systematically caught and added (for example, through information and analysis, new members, and senior sponsors)?

1025. To what degree does the teams work approach provide opportunity for members to engage in results-based evaluation?

1026. To what degree are the structures of the formal organization consistent with the behaviors in the informal organization?

1027. To what degree does the formal organization make use of individual resources and meet individual needs?

1028. To what degree are the goals ambitious?

1029. To what degree are sub-teams possible or necessary?

1030. To what degree are the members clear on what they are individually responsible for and what they are jointly responsible for?

1031. To what degree does the teams work approach provide opportunity for members to engage in open interaction?

1032. What degree are the relative importance and priority of the goals clear to all team members?

1033. To what degree do individual skills and abilities match task demands?

1034. To what degree will team members, individually and collectively, commit time to help themselves and others learn and develop skills?

## 4.2 Variance Analysis: HSE

1035. Does the contractors system include procedures for measuring the performance of critical subcontractors?

1036. Budget versus actual. how does the monthly budget compare to actual experience?

1037. Are records maintained to show how management reserves are used?

1038. Contemplated overhead expenditure for each period based on the best information currently is available?

1039. Are there changes in the overhead pool and/or organization structures?

1040. Does the contractors system identify work accomplishment against the schedule plan?

1041. Why do variances exist?

1042. How do you identify and isolate causes of favorable and unfavorable cost and schedule variances?

1043. Is work progressively subdivided into detailed work packages as requirements are defined?

1044. Are all elements of indirect expense identified to overhead cost budgets of HSE projections?

1045. Did an existing competitor change strategy?

1046. Other relevant issues of Variance Analysis  
-selling price or gross margin?

1047. Are management actions taken to reduce indirect costs when there are significant adverse variances?

1048. Does the contractor use objective results, design reviews and tests to trace schedule performance?

1049. Are the requirements for all items of overhead established by rational, traceable processes?

1050. What does an unfavorable overhead volume variance mean?

1051. What types of services and expense are shared between business segments?

1052. What is your organizations rationale for sharing expenses and services between business segments?

## 4.3 Earned Value Status: HSE

1053. Verification is a process of ensuring that the developed system satisfies the stakeholders agreements and specifications; Are you building the product right? What do you verify?

1054. What is the unit of forecast value?

1055. Where is evidence-based earned value in your organization reported?

1056. Where are your problem areas?

1057. Validation is a process of ensuring that the developed system will actually achieve the stakeholders desired outcomes; Are you building the right product? What do you validate?

1058. Are you hitting your HSE projects targets?

1059. How much is it going to cost by the finish?

1060. If earned value management (EVM) is so good in determining the true status of a HSE project and HSE project its completion, why is it that hardly any one uses it in information systems related HSE projects?

1061. When is it going to finish?

1062. Earned value can be used in almost any HSE project situation and in almost any HSE project environment. it may be used on large HSE projects, medium sized HSE projects, tiny HSE projects (in cut-

down form), complex and simple HSE projects and in any market sector. some people, of course, know all about earned value, they have used it for years - but perhaps not as effectively as they could have?

1063. How does this compare with other HSE projects?

## 4.4 Risk Audit: HSE

1064. What is the Board doing to assure measurement and improve outcomes and quality and reduce avoidable adverse events?

1065. How risk averse are you?

1066. Is safety information provided to all involved?

1067. Is all required equipment available?

1068. Does your organization meet the terms of any contracts with which it is involved?

1069. Are some people working on multiple HSE projects?

1070. Estimated size of product in number of programs, files, transactions?

1071. Do you have written and signed agreements/ contracts in place for each paid staff member?

1072. Does the customer have a solid idea of what is required?

1073. Are end-users enthusiastically committed to the HSE project and the system/product to be built?

1074. Are contracts reviewed before renewal?

1075. Has everyone (staff, volunteers and participants) agreed to a code of behaviour or conduct?



1076. Does the adoption of a business risk audit approach change internal control documentation and testing practices?

1077. What impact does prior experience have on decisions made during the risk-assessment process?

1078. Do you have position descriptions for all key paid and volunteer positions in your organization?

1079. Why do audits fail?

1080. Are your rules, by-laws and practices non-discriminatory?

1081. Are corresponding safety and risk management policies posted for all to see?

1082. Do all coaches/instructors/leaders have appropriate and current accreditation?

1083. Does willful intent modify risk-based auditing?

## 4.5 Contractor Status Report: HSE

1084. Are there contractual transfer concerns?

1085. What process manages the contracts?

1086. Describe how often regular updates are made to the proposed solution. Are corresponding regular updates included in the standard maintenance plan?

1087. What was the final actual cost?

1088. How long have you been using the services?

1089. What was the overall budget or estimated cost?

1090. If applicable; describe your standard schedule for new software version releases. Are new software version releases included in the standard maintenance plan?

1091. What are the minimum and optimal bandwidth requirements for the proposed solution?

1092. What was the budget or estimated cost for your organizations services?

1093. Who can list a HSE project as organization experience, your organization or a previous employee of your organization?

1094. How is risk transferred?

1095. What was the actual budget or estimated cost

for your organizations services?

1096. What is the average response time for answering a support call?

## 4.6 Formal Acceptance: HSE

1097. Have all comments been addressed?

1098. Who supplies data?

1099. What is the Acceptance Management Process?

1100. Did the HSE project achieve its MOV?

1101. Is formal acceptance of the HSE project product documented and distributed?

1102. Who would use it?

1103. General estimate of the costs and times to complete the HSE project?

1104. Do you buy pre-configured systems or build your own configuration?

1105. Was business value realized?

1106. What lessons were learned about your HSE project management methodology?

1107. Was the sponsor/customer satisfied?

1108. Do you buy-in installation services?

1109. Was the HSE project managed well?

1110. Does it do what HSE project team said it would?

1111. How does your team plan to obtain formal acceptance on your HSE project?

1112. Does it do what client said it would?

1113. What function(s) does it fill or meet?

1114. Did the HSE project manager and team act in a professional and ethical manner?

1115. What can you do better next time?

1116. How well did the team follow the methodology?

## 5.0 Closing Process Group: HSE

1117. Were risks identified and mitigated?

1118. What will you do?

1119. Is this a follow-on to a previous HSE project?

1120. How dependent is the HSE project on other HSE projects or work efforts?

1121. Are there funding or time constraints?

1122. Did you do what you said you were going to do?

1123. How critical is the HSE project success to the success of your organization?

1124. How well defined and documented were the HSE project management processes you chose to use?

1125. If action is called for, what form should it take?

1126. Did the HSE project team have the right skills?

1127. Just how important is your work to the overall success of the HSE project?

1128. Were escalated issues resolved promptly?

1129. What is the HSE project Management Process?

1130. What were the desired outcomes?

1131. What were things that you did well, and could improve, and how?

1132. What areas were overlooked on this HSE project?

## 5.1 Procurement Audit: HSE

1133. Were all admitted tenderers invited to submit a tender for each specific contract?

1134. Is there management monitoring of transactions and balances?

1135. Is there time waste during tendering?

1136. Is the purchasing department facility laid out to facilitate interviews with salespersons?

1137. Has the department identified and described the different elements in the procurement process?

1138. Does the procurement function/unit have the ability to apply electronic procurement?

1139. Is there a practice that prohibits signing blank purchase orders?

1140. Are risks in the external environment identified, for example: Budgetary constraints?

1141. Were results of the award procedures published?

1142. Months to reflect any changes in policy?

1143. Where required, did candidates give evidence of complying with quality assurance standards?

1144. Where required, did candidates give evidence of



complying with required environmental management standards?

1145. Was the estimated contract value in line with the final cost of the contract awarded?

1146. Could the bidders assess the economic risks the successful bidder would be responsible for, thus limiting the inclusion of extra charges for risk?

1147. Has an upper limit of cost been fixed?

1148. Is the departments procurement function/unit well organized?

1149. Who are the key suppliers?

1150. Are existing suppliers that have a special right to be consulted being contacted?

1151. Are the responsibilities of the purchasing department clearly defined?

1152. Was the overall procurement done within a reasonable time?

## 5.2 Contract Close-Out: HSE

1153. Was the contract type appropriate?

1154. How/when used ?

1155. What happens to the recipient of services?

1156. Was the contract complete without requiring numerous changes and revisions?

1157. Change in circumstances?

1158. Have all contracts been completed?

1159. What is capture management?

1160. How is the contracting office notified of the automatic contract close-out?

1161. Parties: Authorized?

1162. How does it work?

1163. Have all contracts been closed?

1164. Have all contract records been included in the HSE project archives?

1165. Parties: who is involved?

1166. Was the contract sufficiently clear so as not to result in numerous disputes and misunderstandings?

1167. Why Outsource?

1168. Has each contract been audited to verify acceptance and delivery?

1169. Have all acceptance criteria been met prior to final payment to contractors?

1170. Are the signers the authorized officials?

1171. Change in knowledge?

1172. Change in attitude or behavior?

## 5.3 Project or Phase Close-Out: HSE

1173. Is there a clear cause and effect between the activity and the lesson learned?

1174. Is the lesson based on actual HSE project experience rather than on independent research?

1175. In preparing the Lessons Learned report, should it reflect a consensus viewpoint, or should the report reflect the different individual viewpoints?

1176. In addition to assessing whether the HSE project was successful, it is equally critical to analyze why it was or was not fully successful. Are you including this?

1177. Can the lesson learned be replicated?

1178. What are the informational communication needs for each stakeholder?

1179. What were the actual outcomes?

1180. Planned completion date?

1181. What are the marketing communication needs for each stakeholder?

1182. What information is each stakeholder group interested in?

1183. Who controlled the resources for the HSE project?

1184. What benefits or impacts does the stakeholder group expect to obtain as a result of the HSE project?

1185. What could have been improved?

1186. Were the outcomes different from the already stated planned?

1187. Were messages directly related to the release strategy or phases of the HSE project?

1188. What are the mandatory communication needs for each stakeholder?

1189. When and how were information needs best met?

1190. Complete yes or no?

## 5.4 Lessons Learned: HSE

1191. How much communication is socially oriented?

1192. How do individuals resolve conflict?

1193. How will you allocate your funding resources?

1194. How well does the product or service the HSE project produced meet your needs?

1195. What rewards do the individuals seek?

1196. What is the expected lifespan of the deliverable?

1197. How well does the product or service the HSE project produced meet the defined HSE project requirements?

1198. How effective was HSE project Team member training?

1199. What is the desired end-state?

1200. What if anything has been lacking?

1201. How well were expectations met regarding the frequency and content of information that was conveyed to by the HSE project Manager?

1202. Who has execution authority?

1203. Is there any way in which you think your development process hampered this HSE project?

1204. What HSE project circumstances were not anticipated?

1205. How complete and timely were the materials you were provided to decide whether to proceed from one HSE project lifecycle phase to the next?

1206. What was the geopolitical history during the origin of your organization and at the time of task input?

1207. What is your organizations performance history?

1208. How many interest groups are stakeholders?

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