Checklist for starting surgery management engineering projects

Discuss and complete the following with hospital management at the start.

- Scope, it is __________________________________________________
- Primary contact person(s) are ________________________________

Logistics:
- Agreement or understanding letter defined and signed to assure clarity of the project, timeline, its objectives and scope.
- CEO &/or other execs, met, reviewed project objectives, responsibilities, contacts
- Access, badges, parking (if necessary) *
- HIPPA requirements, TB requirements *
- Office space, computer/internet access *
- Any phonebook or directory available for people we may wish to contact? *
- Who is IT contact, source of data queries? *
- Follow up memo to hospital/department confirming project plans, objective & scope
- Schedule Kick off meeting with as many people as possible

Content items, define these at start to increase chances of success:
- Who are the stakeholders in this?
- Metrics, are we clear? What is available now?
- Report Card, is there one relevant, need to start immediately if not.
- We do ongoing status reports & meetings
- Explain early tasks; process maps, data sources
- Any prior studies, consultants, prior work?
- What documentation is available on processes, forms control?
- What/when are regular surgery staff meetings?

Date ______________________ by __________

* If an internal project done with internal staff some of these items may be unnecessary but it will prove useful still to do these before the project start.