

## ***ENVIRONMENTAL ASSESSMENT SURVEY INSTRUMENT***

The purpose of EASI is to measure how well the environment supports project management in your organization.

Before starting this exploration, please identify your:

**NAME:**

**ORGANIZATION:**

**AFFILIATION:**

**PROJECT NAME:**

**INDUSTRY:**

**EMAIL ADDRESS:**

To be consistent, think of a specific project and answer each question with that project in mind.

See additional instructions on the final page for printing and submittal.

Please scroll down to begin.

# ***ENVIRONMENTAL ASSESSMENT SURVEY INSTRUMENT***

The purpose of EASI is to measure how well the environment supports project management in your organization. The following questions refer to your current project. If you are not now working on a project, or if your current project has just begun and you feel you cannot answer the questions appropriately, then refer to the last project you worked on when answering these questions. If you are an upper manager, think of the project or projects with which you are most closely associated.

Rate each statement using any number from a low of 1 to a high of 7. Use the following guidelines:

"1" means the statement is true to an *extremely small extent, never or not at all.*

"4" means it is true to an *average extent, or about normal in degree or frequency.*

"7" means it is true to an *extremely large extent, always or without fail.*

## **1) Project Based Organization**

1. Projects are important for the future of this organization.
2. Upper managers appreciate the role of project management.
3. The current organizational structure supports project work.
4. People in this organization embrace teams, consensus action, empowerment, trust, and open communication.
5. The organization adapts readily to change.
6. Managers are authentic and act with integrity.
7. Upper managers work together as a team.
8. Everyone acts with concern for the success of the project.
9. Success in the organization depends on the performance of all participants.
10. Clear measures are in place for project success.

\_\_\_\_\_ **Total: Project Based Organization: Average** \_\_\_\_\_

## **2) Strategic Emphasis**

11. I am aware of my organization's business strategy.
12. The project goal is clearly linked to a business strategic goal.
13. Team members understand how this project adds value to the organization.
14. Core team members participated in defining the project goal statement.
15. Consistent criteria were applied to select this project.
16. I know how this project links with other projects to implement organizational strategy.
17. This project was selected based on a comparative priority ranking of contribution to organizational strategy.
18. The team trusts upper management that this project is not likely to be canceled unless there is a change in strategy.
19. The project has a clearly defined, supportive upper management sponsor.
20. I can focus on this project without disruption from other projects.

\_\_\_\_\_ **Total: Strategic Emphasis: Average** \_\_\_\_\_

### 3) Upper Management Support

21. Managers of all team members fully support the need for this project.
22. Upper managers allow the team to do the job without interference.
23. Upper managers do not change project specifications.
24. The project deadline was negotiated with the project sponsor.
25. Upper managers understand the benefits of project management.
26. The sponsor works with the project manager to negotiate any changes in schedule or resource levels.
27. Organizational reward systems properly motivate work on projects.
28. Upper managers are more interested in project results than they are in controlling the project.
29. I feel that upper managers fully understand the project management process.
30. Upper managers support the project planning process.

\_\_\_\_\_ **Total: Upper Management Support: Average** \_\_\_\_\_

### 4) Project Team Support

31. (Most) project team members work full-time on this project.
32. A core team has been established to work together from the beginning to the end of the project.
33. Project core team members are located together when they work on this project.
34. Project team members do not feel they are working on too many projects.
35. Teamwork is rewarded in this organization.
36. A customer or end user representative is on the core team.
37. Project team members want to be on this team.
38. Upper managers provide support for project startup activities.
39. Upper managers do not interchange or pull people off projects.
40. All project team members feel responsible for the success of the project.

\_\_\_\_\_ **Total: Project Team Support: Average** \_\_\_\_\_

### 5) Organization Support

41. Projects align with meeting the needs of customers.
42. Project priorities are consistent across the organization.
43. The organization rewards team members if they are successful on this project.
44. A consistent project management process or methodology is used.
45. Balance exists between the needs of projects and the needs of continuing operations within the organization.
46. The project manager position has the necessary scope and sufficient authority for the project size.
47. The organization supports desired behaviors with structure, measures, and rewards.
48. Projects integrate well across the organization.

49. Organizational structure supports rather than creates obstacles to project work.
50. The organization is flexible to accommodate specific characteristics or requirements of the project.

\_\_\_\_\_ **Total: Organization Support: Average** \_\_\_\_\_

## **6) Project Management Information Systems**

51. The benefits of good communications are apparent to all stakeholders.
52. The project plan has been communicated to all project stakeholders.
53. Sharing information about this project reduces anxiety in the organization.
54. Team members are aware of deadlines for their activities.
55. Project team members communicate easily with each other.
56. People speak the truth to upper managers without fear of recrimination.
57. Communication and political plans are developed, used, and updated throughout the project.
58. Available information about the project answers stakeholder questions, is there when they need it, and is easy to understand.
59. The information system supports organizational learning.
60. Reports are streamlined and provide the basis for making decisions and taking appropriate actions.

\_\_\_\_\_ **Total: Project Management Information Systems: Average** \_\_\_\_\_

## **7) Project Manager Selection and Development**

61. This project has a single project manager appointed.
62. The project manager was selected based on a formal process.
63. Criteria for selection were based on ability to do the job, not as a reward for past work.
64. The project manager is enthusiastic about this project and managing it.
65. A curriculum is available that provides training on the necessary technical, behavioral, organizational, and business skills.
66. The project manager receives adequate training.
67. Project managers have the opportunity to network with other PMs and share best practices.
68. The organization has identified competencies and skills for project managers at different levels based upon project complexity.
69. The manager of this project has a clear development plan, or career path, to follow.
70. "Project Manager" is a recognized job title in this organization.

\_\_\_\_\_ **Total: Project Manager Selection and Development: Average** \_\_\_\_\_

## **8) A Learning Organization**

71. People on the project and across the organization believe that continuous learning is a priority.

72. Experimentation and creativity are encouraged.
73. Upper managers survey and act on employee feedback.
74. Decisions and action are based upon data and evidence available from a project management information system.
75. Project goals are balanced among performance, experience, and learning.
76. Upper managers encourage learning from mistakes as well as from successes.
77. A project review will be held at the end of this project.
78. Outcomes from the project review help improve the project management process.
79. The results of the project review will be shared with other teams across the organization.
80. Management will take action on key findings from the project review.

\_\_\_\_\_ **Total: Learning Organization: Average** \_\_\_\_\_

## 9) Project Office

81. There is a person or group in charge of improving project management in this organization.
82. Resources are available to assist starting or implementing stages in the project life cycle.
83. A project management methodology provides common terminology and consistent expectations for managing this project.
84. I know where to get project management training.
85. Consulting and facilitation assistance are available within the organization.
86. The project is listed on a master plan.
87. Administrative support is available for this project.
88. A central repository exists to capture and extract information on best practices.
89. I can access a mediator to resolve cross project or cross organizational issues.
90. A project office is available to help select, execute, and close my project.

\_\_\_\_\_ **Total: Project Office: Average** \_\_\_\_\_

## 10) Project Management Culture

91. We have an inventory of all projects under way and proposed.
92. Management support for project work exists at all levels of the organization.
93. Project selection is a clear cut process.
94. Upper managers model the desired behavior for project teams.
95. "Accidental project managers" are not the normal staffing process for projects.
96. Project management is viewed as a career position.
97. Reviews are conducted for all projects and shared with other project teams.
98. We function in a trusting, open environment.
99. Management values authentic behavior—saying what you believe.
100. We practice integrity in all interactions—doing what we said.

\_\_\_\_\_ **Total: Project Management Culture: Average** \_\_\_\_\_

## Success Assessment

While the purpose of EASI is to measure how well the environment supports project management in your organization, the ultimate benefit being sought is for each project to be successful and contribute value to the organization. The goal of capturing benchmarking data is to correlate component factors with project success.

Assess how well this project has succeeded or has the potential to succeed if it is currently in process. Use these criteria:

1. Project did not accomplish any of its objectives.
2. Project met only one of its objectives.
3. Project met some of its objectives.
4. Project satisfied the triple constraints of scope, schedule, and resources.
5. Project fully satisfied customer, user, or client requirements.
6. Over time the project contributed significant value, exceeding expectations.
7. Project met or exceeded key stakeholder requirements and contributed value and benefits far in excess of its costs.

**The Project was a complete success** (pick one):

1. Strongly Disagree
2. Disagree
3. Somewhat Disagree
4. Neutral
5. Somewhat Agree
6. Agree
7. Strongly Agree

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**NOTES** (to self, based upon the **E**nvironmental **A**ssessment **S**urvey **I**nstrument questions):

## Instructions

Once completed scoring each question, PRINT the complete document so you have a record of your scores.

Then post average scores online to have your scores entered into the benchmark database. A report will be generated and posted that shows the cumulative benchmark data. This allows you to compare your scores with others who are interested in improving their project environments. With this data, you can:

- ✚ Identify if you are at, below, or above par in your average score for each section
- ✚ Use this data to discuss or suggest changes with other people in your organization
- ✚ Read case studies in the Graham/Englund book [\*Creating an Environment for Successful Projects, 2ed\*](#) that describe why, what, and how to address the ten surveyed areas
- ✚ Prepare an action plan for building upon strengths and making improvements (see sample EASI action plan template in the "Offerings" section of [www.englundpmc.com](http://www.englundpmc.com))

Please add any **COMMENTS** or suggestions about this assessment tool or its contents: