Process Checkup

In the first table, assess whether you have documented processes for each category item. If a category needs a process or additional processes, make a plan for when this should be documented and who will lead or contribute to the process documentation.

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| --- | --- | --- | --- | --- | --- |
| **Category** | **Yes** | **No** | **Develop by (date)** | **Assign to (name)** | **Notes** |
| Group Handbook/Manual |  |  |  |  |  |
| Protocols/SOPs for All Research Processes |  |  |  |  |  |
| Protocols/SOPs for Data Practices |  |  |  |  |  |
| Processes for Communications |  |  |  |  |  |
| Processes for Budget/Finance |  |  |  |  |  |
| Processes for Inventory/Ordering |  |  |  |  |  |
| Processes for Scheduling/Meetings |  |  |  |  |  |
| Processes for Knowledge Work |  |  |  |  |  |
| Other? |  |  |  |  |  |
| Emergency Plans  Communications  Personnel backups |  |  |  |  |  |

In the table below, list the name of an existing process you/your team use. Then, assess each quality by assigning R (red), Y (yellow), or G (green).

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| --- | --- | --- | --- |
| **Existing Process Name** | **Achieves Desired Outcome** | **Limits Waste (time, human power, resources)** | **Consistent/ Reproducible** |
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