

## **ATTACHMENT D – ASSESSMENT PLAN TEMPLATE**

- 1.0 **Assessment Title**  
Identify the title of the assessment.
- 2.0 **Assessment Date**  
Identify the date(s) the assessment will be performed.
- 3.0 **Assessment Location, if applicable**  
Identify the location the assessment will be performed.
- 4.0 **Assessment Team**  
Identify the Team Leader and each team member on the assessment team.
- 5.0 **Assessment Purpose**  
State the purpose of, or the reason why, the assessment is being performed.
- 6.0 **Assessment Scope and Assessment Criteria**  
State the scope of the assessment. The scope may describe:
  - Primary concerns addressed by each assessment,
  - Locations to be assessed,
  - Population to be assessed, and
  - Work practices to be assessed.

The scope should also include the methodology used to perform assessment activities, such as document and record reviews, personnel interviews, work observation.

- 6.1 **Identify focus area**  
Identify the focus area(s) to be assessed.
- 6.2 **Identify assessment criteria**  
Identify the requirements, external or internal, against which the focus area will be assessed. The assessment criteria should reflect the specific requirements applicable with the scope of the assessment.