Project Status Report

Template & Guide

Version 2.4 (November 2008)

This Guide is intended to be read in conjunction with the following template for the development of a Project Status Report. As such the Guide should be removed from the front of your final document.

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What is a Project Status Report?

The *Project Status Report* is a document that is used by Project Managers for formal regular reporting on the status of a project to the Steering Committee, Project Sponsor, Senior Manager or other Key Stakeholders, depending on the size of the project. It is important to remember that the role of the Steering Committee, Project Sponsor or Senior Manager is to take responsibility for the business issues associated with the project.

Regular status reports also provide an ongoing history of the project, which become useful in terms of tracking progress, evaluation and review.

The *Project Status Report* should include, as a minimum, the following:

* Status of the project ‑ description, milestones for the last reporting period; milestones for the next reporting period; impact of achievement/non-achievement of milestones for the remaining period of the project. Milestones should reflect any relevant high-level milestones listed in the Business Plan as well as major milestones and achievements from the Project Work Plan (or *Project Execution Plan*).
* Budget Report ‑ with respect to planned expenditure, actual expenditure deficit/surplus and revenue against planned output delivery, if appropriate.
* Risk Management Report ‑ specifying any changes to the major risks identified since the previous report and modification to the strategies put in place to manage them; any new risks that have arisen since the last report, as identified in the *Risk Register*.
* Issues Report - including areas of concern, specific problems, and any action/decision that needs to be taken by the Steering Committee or Project Sponsor/Senior Manager, as identified in the *Issues Register*.
* Any general information.
* Recommendations.

It is important to keep the report focused and to report on/against milestones and not percentage of work complete.

Why would you develop a Project Status Report?

A *Project Status Report* is developed by the Project Manager to provide regular progress reports to:

* the Steering Committee, Project Sponsor, Senior Manager or other Key Stakeholders with information on the management issues of the project and for endorsement of any decisions/directions made in the report;
* the Inter Agency Steering Committee (IASC) if the project extends across government;
* individuals or Committees who are overseeing progress of the project; and
* ensure that no additional work or scope creep occurs.

When would you develop a Project Status Report?

The frequency of status reporting will vary depending on the size of the project and the requirements of the Steering Committee/Project Sponsor.

With very small projects this may consist of fortnightly consideration of any issues that could affect progress and/or a meeting with the Project Sponsor/Senior Manager.

For large and/or more complex projects the status report forms an integral part of the project, as information for the reports is drawn from the project management processes in place for the project.

What you need before you start

* An agreed *Project Business Plan* or *Project Brief*.
* Knowledge and understanding of the project activities, schedule, issues, risks and budget, stakeholders, contractors and staff.
* Knowledge and understanding of issues management and risk management.
* Project budgetary information.
* Schedule of meetings.
* Knowledge of the *Tasmanian Government Project Management Guidelines*.

Other references you may need

* Corporate/Business Plan for the Department/Business Unit.
* *Tasmanian Government Project Management Guidelines*.
* Departmental Project Management Guidelines.

What you will have when you are finished

A complete *Project Status Report* that is ready for presentation to the Senior Manager, Project Sponsor, Steering Committee or other Key Stakeholders, depending on the size of the project.

How to use this template

The template consists of a number of headings and simple tables that reflect the nature of the information that is to be addressed.

The completed status report should be brief and to the point, so it quickly conveys the essential information.

A number of different text styles have been used within the template, as follows:

* Text in blue italics is intended to provide a guide as to the kind of information that can be included in a section and to what types of projects it might be applicable.
* Text in normal font is intended as examples.
* Text enclosed in <angle brackets> is intended to be replaced by whatever it is describing.
* This document has been formatted for duplex printing. If you intend to print single sided, you may need to delete some page breaks.

As no two projects are ever the same, the *Project Management Knowledge Base* at [www.egovernment.tas.gov.au](http://www.egovernment.tas.gov.au) includes various examples of *Project Proposals* that describe the different approaches taken to ensure the initiation process is appropriately managed.

Checklist

**Have you remembered to remove**:

* The versioning statement from the front cover of your document?
* This guide and checklist from the front of your document?
* All blue italic instructional text and < text enclosed in angle brackets> within the template

|  |
| --- |
|  |
| <>  Status Report No.<n>  <dd-mm-yyyy> File No.: <xxxxxxx> |
| *The version number starts at one and increases by one for each release. It shows the release number and a revision letter if in draft. The original draft is 0.A and subsequent drafts are 0.B, 0.C etc. The first accepted and issued document is 1.0. Subsequent changes in draft form are 1.0A, 1.0B etc.. The accepted and issued second version is 1.1 or 2.0, depending on the magnitude of the change.*  Refer to the Project Management Fact Sheet: Document Control, for more information at [www.egovernment.tas.gov.au](http://www.egovernment.tas.gov.au) |

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| Version No: <n.n> <dd-mm-yyyy>  Copy: uncontrolled |

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|  |  |
| --- | --- |
| Report for: | (Optional) eg <Project Name> Steering Committee |
| Project Manager: | *<*Name*>* |
| Project Objective: | As stated in the Project Business Plan*.* |

# Project Progress Summary:

A brief statement of project performance not covered in the remainder of the report. Describe the Project’s progress towards meeting its target outcomes during this reporting period. Anecdotal information may be provided.

## Milestones

This section should reflect any relevant high-level milestones listed in the Business Plan as well as major milestones and achievements from the Project Work Plan (or Project Execution Plan).

Baseline dates are those outlined in Project Business Plan or other core document.

Table 1 - Milestones scheduled for achievement since last report and performance against those milestones:

|  |  |  |  |
| --- | --- | --- | --- |
| Milestone | Baseline Date | Target Date | Achievement |
| <Description of milestone> | dd-mm-yyyy | dd-mm-yyyy | dd-mm-yyyy |
|  |  |  |  |

Table 2 - Impact of achievement / non-achievement of milestones for the remaining period of the project:

|  |  |
| --- | --- |
| Milestone | Impact |
| Description of affected/amended/changed milestone | Briefly describe any changes to the project schedule required as a result of the amended milestone(s). |
|  |  |

Table 3 - Milestones scheduled for achievement over the next reporting period and changes to those milestones with respect to the previous plan:

|  |  |  |  |
| --- | --- | --- | --- |
| Milestone | Baseline Date | Previous Target Date | Current Target Date |
| Description of milestone | *dd-mm-yyyy* | *dd-mm-yyyy* | *dd-mm-yyyy* |
|  |  |  |  |

## General Information

Include any general comments that may support/enhance/add to the above sections.

Things to note in this section may include:

* Staffing issues, training undertaken
* Update on employment of consultants, eg detail how government purchasing principles and policies have been applied to each tender process.
* A follow-up assessment of products/services provided against the initial terms of engagement should be provided in a later Status Report.

# Budget:

Where the project draws on multiple funding sources (eg Commonwealth and State funds), separate budget analysis should be provided for each source.

Where the project is beginning the transition to program mode, Business Owners need to be made aware of the level of recurrent expenditure required for ongoing maintenance of the outputs.

Table 4 - Funding Sources

|  |  |  |
| --- | --- | --- |
| Department of … (Tasmanian Government) |  | $ 500 000 |
| Department of … (Australian Government) | (plus) | $ 500 000 |
| Total project funding | (equals) | $ 1 000 000 |

Table 5 - Project Budget Overview

|  |  |  |
| --- | --- | --- |
| Total Project funding | Example: 4 year project | $1 000 000 |
| Expenditure for <Financial Year A/B> | (minus) | $ 200 000 |
| Expenditure for <Financial Year B/C> | (minus) | $ 250 000 |
| Remaining budget for life of project | (equals) | $ 550 000 |
| Preliminary allocation for <Financial Year C/D> |  | $ 300 000 |

Table 6 – Simple budget t*o <end mm-yyyy C/D>*

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Planned Expenditure  <mm> | Actual Expenditure  <mm> | Deficit/Surplus1 |
| *dd-mm-yyyy* |  |  |  |

Table 7 - <financial year C/D>

|  |  |  |  |
| --- | --- | --- | --- |
| Date | Planned Expenditure | Actual Expenditure | Deficit/Surplus1 |
| *dd-mm-yyyy* |  |  |  |

Table 8 – Detailed budget for medium-large projects2

|  |  |  |  |
| --- | --- | --- | --- |
| Operating Expenses <start> mm-yyyy to <end> mm-yyyy | Current Budget  (Planned Expenditure) | YTD  Actual Expenditure | Deficit/Surplus1 |
| Salary |  |  |  |
| Salary and Related Expenditure |  |  |  |
| Other Employee related expenses |  |  |  |
| Total for salaries and other related expenditure |  |  |  |
|  |  |  |  |
| Operating Costs |  |  |  |
| Rent and Accommodation related expenses |  |  |  |
| Communications |  |  |  |
| Travel (including motor vehicle expenses) |  |  |  |
| Advertising and promotion |  |  |  |
| Consultancies |  |  |  |
| Information Technology |  |  |  |
| Other administrative expenses |  |  |  |
|  |  |  |  |
| Total for operating expenditure |  |  |  |
|  |  |  |  |
| Overall total |  |  |  |

1 Deficit reflects whether the project has expended **more** than the anticipated budget for the reporting period (overspend). Surplus reflects whether the project has expended **less** than the anticipated budget for the reporting period (underspend).

2 These fields are standard reporting items on Finance 1.

## Comments:

Additional comments should be included to indicate reasons for the deficit/overspend or surplus/underspend in the monthly budget and anticipated expenditure for the year to date.

# Project Risk Management Statement

Identify any changes in risk status to the previous report. See risk grading key below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Risk | Likelihood | Seriousness | Grade | Change |
| Brief description of the Extreme, major A and B grade risks or any significant changes in grading, and new risks identified. | *Low/Medium/High* | *Low/Medium/High* |  | *Increase/ Decrease/ New* |

Risk Grading Key:

|  |  |
| --- | --- |
| **Grade** | |
| E | Extreme |
| A | High/High |
| B | High/Medium or Medium/High |
| C | High/Low or Medium/Medium |
| D | Medium/Low |
| N | Low/Low |

## Comments:

Include explanation of why the risk rating has been changed. Where the rating has been increased, include details of mitigation actions.

Discuss the effectiveness of risk mitigation strategies that have been applied to A and B grade risks. This can include any changes to risk mitigation strategies.

Large projects should consider providing the Steering Committee with a separate Risk Status Report detailing risk mitigation activities for the reporting period. This can be useful in managing Extreme risks.

# Issues:

Brief description of any business issues associated with the project that have arisen since the previous report and need to be addressed by the Steering Committee, Project Sponsor or Senior Manager etc.

For small projects this section can be utilised for recording and monitoring of project issues in the absence of an Issues Register. See the Issues Register Proforma for an overview of the required information.

# Recommendations:

Brief statement(s) for the Steering Committee, Project Sponsor or Senior Manager to consider and/or endorse. Where no recommendations are raised for endorsement, this section should state that ‘the Steering Committee note the Status Report.’