STATE OF ALABAMA
OFFICE OF INFORMATION TECHNOLOGY

OIT Procedure 430P1
Moderate Project Status Report

PROCEDURE NUMBER   OIT Procedure 430P1-01

VERSION DATE   April 12, 2016

PROCEDURE TITLE   Moderate Project Status Report

GOVERNING POLICY   This procedure is governed by the current OIT Policy 430: IT Project Execution and Control, regardless of revision.

TERMS AND
DEFINITIONS   Office of Information Technology (OIT) – formed through the passage of Senate Bill 117, to focus on three statutory mandates: IT Strategic Planning, IT Governance, and IT Resource Utilization.

Project Status Report – an assessment report that conveys details such as what tasks have been accomplished, what resources have been expended, what issues and risks have been encountered, and whether the project is expected to be completed on time and within budget. Project Status Reports are used by OIT to determine whether changes are necessary to an ongoing effort.

OBJECTIVE   The objective of this procedure is to provide guidance on how to complete and submit a Moderate Project Status Report to OIT. The Project Status Report is part of the Execution Phase.

PURPOSE   This procedure's purpose is to provide instructions for completing the Moderate Project Status Report.

SUPPORTING
DOCUMENTS   The following documents support this Procedure:
- OIT Policy 430: IT Project Execution and Control
- OIT Template 430T1: Moderate Project Status Report
- OIT Template 410T2: IT Project Sizing

EFFECTIVE DATE   This Procedure shall be effective upon its approval by the Secretary
                           of Information Technology, as evidenced by the signature of the
                           Secretary being affixed hereto.

SUPERSEDES   This is the initial Procedure and does not supersede a previous
                           version.

PROCEDURE   Moderate Project Status Report

1   Introduction

1.1 Inputs

- The Moderate Project Status Report Template must be used for projects sized as
  'Moderate'. Project size should have been determined using the OIT Template
  410T2: IT Project Sizing during the Project Initiation phase.
- The Moderate Project Status Report Template can be downloaded from OIT's website.
- The Moderate Project Status Report must be submitted to OIT on a regular basis as
  defined in the Project Management Plan.

1.2 Entry Criteria

- The Project Status Report for Moderate projects must be completed using the
  Moderate Project Status Report Template.
    o OIT Template 430T1: Moderate Project Status Report

1.3 Procedural Steps

1. Open the Moderate Project Status Report Template.
2. The first page is a **Summary page** that will provide a quick glance summary of the
   project status.
    o Enter Agency Name – the name of your state government entity.
    o Enter the person's name that is the Project Manager for this project.
    o Enter the Reporting Period - This could be a specific date range, month or
       quarter and year.
    o Enter the names of the project Stakeholder(s).
    o Planned vs Actual budget information: In this section, you may either insert
       an image in chart format to match your project budget and expenses or
       update the existing chart.
    o Quick Overview: The Project Status column should be updated to green,
       yellow or red and should match the "Current Status" in the "Overall
       Summary" section on page 2. Next, the number of changes and
       deliverables should reflect the same number of matching items in the
       following pages.

- o Insert an image of the Project Plan Timeline in the section on the bottom of page 1. This may be a screenshot of the project plan that shows the timeline of major deliverables.
3. **Project Status Summary**:
   - o **Prior Status** – In the field to the right of "Prior Status" enter the overall status the project was at on the last status report using one of the following options (if this is the first report on this project, enter "Green"):
     - ▪ Green = The project was within 15% variance of the approved baseline for budget and schedule and is expected to substantially meet all of the business objectives established.
     - ▪ Yellow = The project is between 16% to 25% variance of the currently approved baseline for budget and/or schedule and could be at risk of not meeting all of the business objectives.
     - ▪ Red = The project exceeds 25% variance of the currently approved baseline for budget and/or schedule and is not expected to meet all of the business objectives established.
   - o **Current Status** – In the field to the right of "Current Status" enter the overall status of the project at the present time.
     - ▪ Green = The project was within 15% variance of the approved baseline for budget and schedule and is expected to substantially meet all of the business objectives established.
     - ▪ Yellow = The project is between 16% to 25% variance of the currently approved baseline for budget and/or schedule and could be at risk of not meeting all of the business objectives.
     - ▪ Red = The project exceeds 25% variance of the currently approved baseline for budget and/or schedule and is not expected to meet all of the business objectives established.
   - o This section should represent a narrative picture of the project's progress during the reporting period. It should contain enough information to give the reader a clear understanding of project accomplishments, expected accomplishments for the next reporting period and major risks or issues that have required escalation.
4. **Updated Project Plan:**
   - o **Prior Status** – In the field to the right of "Prior Status" enter the project plan status as it was on the last report using one of the following options (if this is the first report on this project, enter "Green"):
     - ▪ Green = Variance to schedule was within 15%.
     - ▪ Yellow = Variance to schedule is between 16% to 25%.
     - ▪ Red = Variance to schedule exceeds 25%.
   - o **Current Status** – In the field to the right of "Current Status" enter the project plan status at the present time.
     - ▪ Green = Variance to schedule was within 15%.
     - ▪ Yellow = Variance to schedule is between 16% to 25%.
     - ▪ Red = Variance to schedule exceeds 25%.

- o **Task lines** - Enter individual lines representing your milestone tasks pulled from the actual project plan. Rows can be added and removed as needed.
- o **% Complete** – Indicates what percentage has been completed on this particular task.
- o **Task Name –** Descriptive name of the task.
- o **Duration –** Enter the estimated time required to complete this task.
- o **Start Date –** This date should align with the project plan schedule and the project initiation packet.
- o **Finish Date –** This date should align with the project plan schedule and project initiation packet.
- o **On Schedule –** A "yes" or "No" response should be entered here.
- o Enter any comments or supporting information to explain changes since the previous report in the text area.
5. **Scope Management:**
   - o **Change Control Log Summary –** This log lists all scope changes occurring during the reporting period and must identify any budget and/or schedule baseline changes that resulted from the change. Once reported, changes should be removed for the next reporting period.
   - o **Deliverable Log Summary –** This log lists all accepted deliverables during the reporting period. Once reported, line items should be removed for the next reporting period.

2 Verification/Supporting Data

2.1 Output

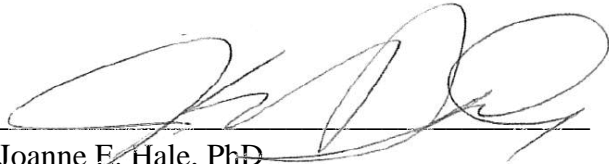The completed Project Status Report should be submitted to OIT.

2.2 Responsibility/Authority

OIT has reviewed and approved this procedure and has the authority to ensure compliance with this procedure.

2.3 Deviation/Tailoring

There should not be any deviation of entire sections to this procedure. Individual line items within the sections may be added or deleted, as mentioned in the procedural steps above. If deviations of entire sections are desired, approval from OIT is required.

The undersigned, as Acting Secretary of Information Technology of the State of Alabama, exercising the power vested in that Office by the laws of this State, declares this Procedure to be available for adoption as of the __12_____ day of ____April_____, 20_16___.

Joanne E. Hale, PhD
Acting Secretary of Information Technology

DOCUMENT CHANGE HISTORY

Version	Release Date	Comments
430P1-01	April 12, 2016	Initial version