STATE OF ALABAMA
OFFICE OF INFORMATION TECHNOLOGY

OIT Procedure 430P2
Major Project Status Report

STANDARD NUMBER	OIT Procedure 430P2-01
VERSION DATE	April 12, 2016
PROCEDURE TITLE	Major Project Status Report
GOVERNING POLICY	This procedure is governed by the current OIT Policy 430: IT 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 during a project 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 Major Project Status Report to OIT. The Project Status Report is part of the Execution and Controlling Phase.
PURPOSE	This procedure's purpose is to provide instructions for completing the Major Project Status Report.
SUPPORTING DOCUMENTS	The following documents support this Procedure: • OIT Policy 430: IT Project Execution and Control • OIT Template 430T2: Major 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	Major Project Status Report

1 Introduction

1.1 Inputs

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

1.2 Entry Criteria

- The Project Status Report for Major projects must be completed using the Major Project Status Report Template.
  - o OIT Template 430T2: Major Project Status Report

1.3 Procedural Steps

1. Open the Major 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 your Stakeholder(s) (i.e. Project Champions).
   - o Planned vs Actual budget information: Insert an image in chart format to match your project budget and expenses.
   - o Quick Overview: Project Status should be green, yellow or red and should match the "Current Status" in the "Overall Summary" section on page 2. Next, the number of each type of item 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**:

- **Prior Status** – In the field to the right of "Prior Status" enter the overall status the project was at on the last 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.
- **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.
- 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. **Cost Management**:
    - **Prior Status** – In the field to the right of "Prior Status" enter the cost management status of the project 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 cost was within 15%.
        - Yellow = Variance to cost is between 16% and 25%.
        - Red = Variance to cost exceeds 25%.
    - **Current Status** – In the field to the right of "Current Status" enter the cost management status of the project at the present time.
        - Green = Variance to cost was within 15%.
        - Yellow = Variance to cost is between 16% and 25%.
        - Red = Variance to cost exceeds 25%.

    - **Budget Type** = Individual lines for specific project costs can be added or deleted, as needed.
    - **Baseline Budget** – These figures should align with the baseline project plan budget.

- o **Current Revised Budget–** If scope changes or re-plans exist which change individual line items or budget totals, it should be represented in this column during the period when the changes occurred. This will represent the new baseline budget for variance calculations.
- o **Actual Cost –** For purposes of calculating variance, this column represents funds expended, not bills paid. For example, if a deliverable is accepted and there is a payment attached, those funds should be reflected in this column regardless of billing or payment status.
- o **% Cost Variance –** Calculate the variance percentage based on the difference between the original cost and the actual cost.
- o **Over/Under –** Enter Over or Under based on the difference the original cost and the actual cost.
- o **Estimate at Completion –** This figure represents the organization's best estimate of the total cost to complete the project and achieve the objectives stated in the project plan.
- o **Project Budget –** Totals of the above listed columns. This represents the organization's best estimate of the total cost to complete the project and achieve the objectives stated in the project plan.
- o **Total Budget –** This represents that total amount needed to complete the project.

5. **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% and 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 is within 15%.
  - ▪ Yellow = Variance to schedule is between 16% and 25%
  - ▪ Red = Variance to schedule exceeds 25%.
- o **Task lines** - Enter individual lines representing your milestone tasks pulled from the actual project plan.
- 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.

6. **Scope Management:**
   - o **Change Control Log Summary –** This log must contain 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 Acceptance Log Summary –** This log lists all accepted deliverables during the reporting period. Once reported, line items should be removed for the next reporting period.
7. **Risk/Issue Management:**
   - o **Risk Management Log Summary –** This section should include active risks or new potential risks that have been identified during the reporting period. Once an active risk is added, it should remain until resolved. At that time, the resolution should be noted and the line item may be removed for the next reporting period.
   - o **Issue Management Log Summary –** This section should include issues that are active during the reporting period. Once an issue is added, it should remain until resolved. At that time, the resolution should be noted and the line item may be removed for the next reporting period.

2   <u>Verification/Supporting Data</u>

2.1   Output

The completed Project Status Report should be submitted to OIT on a regular basis.

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___.

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Joanne E. Hale, PhD
Acting Secretary of Information Technology

DOCUMENT CHANGE HISTORY

Version	Release Date	Comments
430P2-01	April 12, 2016	Initial version