

Project Portfolio Management (PPM) Monthly Status Reporting Procedure

All projects registered in PPM must update project status information monthly. Additionally, project managers and agency coordinators should review all project information to ensure accuracy. A change that may impact the accuracy of project information includes, but is not limited to the following:

- Integrated change control
- Change in project phase or project state
- Progressive elaboration of project deliverables (for example: after the Project Charter is complete, funding sources may be different than when the project was proposed)

Who updates project status?

- The Project Manager is responsible to prepare status information.
- The Agency Coordinator is responsible for posting project status information on PPM by end of the day, the first calendar day of the month.

Required Fields – Completed when Registering a Project

- Name
- Proposed Start Date
- Proposed Finish Date
- Project Class
- Project Type
- Project State
- Project Phase
- Primary Project Driver
- Primary Project Outcome
- Primary Funding Source
- Brief Project Description
- Activity
- Project Requestor

Monthly Reporting – Fields Required for Status Updating

- Accomplishments
- Next Steps
- Overall Status
- Budget Status
- Scope Status
- Schedule Status
- Risk Status
- Issue Status
- Control Status
- Date Status Updated

Accomplishments

1. **Updates** are recorded for the project activities within the **last month only**.
2. How to write your project activities
 - a. Use verb, object/subject of important high-level activities
 - b. Use past tense verbs because these are past accomplishments.
 - c. Do not submit a “journal” of everything you and your team did (such as “conducted team meeting, “worked on project schedule.” There is a spacing constraint. If the data is too long, you risk not being able to read all your project activities listed in the status report.
 - d. In general, try not to use pronouns or personal names.
Example: If referring to something you accomplished, it should be written in the past tense as in the following: “the project manager has/did/planned or, the Business Analyst recommended,” etc.
1. Format of the Accomplishments section
 - a. Start with reporting period dates
 - b. List each activity (line) starting with a bullet.
 - c. In the Accomplishments section you will always show the **past 30 days** of project activities.
 - d. **Delete all other report periods**

Next Steps

1. **Next Steps** report **future** project activities forecasted to occur during the **one month** period.
2. How to write your future projects activities:
 - a. Use verb, object/subject of important high-level activities
 - b. In general, do not use pronouns or personal names. Example: If referring to something you will accomplish, it should be written as “the project manager plans to...”
3. Use verb, object/subject of important high-level activities
4. Format of the Next Steps section
 1. Start with report period dates
 2. List the future activities starting with a bullet.
 3. **Delete all other time periods**

Project Health Scale

The following recorded fields require a color scale:

- Overall Status
- Budget Status
- Schedule Status
- Scope Status
- Risk Status
- Issue Status
- Control Status

Mark each field with the appropriate color that reflects the project status below:

- **Green** - Project and tasks are on track per plan.
- **Yellow** - Project not quite to plan. Task or Project is behind schedule or over budget or scope is creeping / changing. I have a plan to fix the issue. Project change request may be in process. Minor issue.
- **Red** - I am off plan. I need help from management. I am not sure how to proceed. This is a serious issue with the task or plan. There is a problem which affects the critical path. This is a judgment call (raising your hand).

Comments

Any time you report Red or Yellow status, in the above seven status fields you must state **why** the status is at risk in the Comments section. Consider including the following:

- List any current major issues
- List any major risks (with mitigation strategy if known)
- Always review your comments area and delete those comments that do not apply to the current reporting period.

Date Status Updated

- Change this date each reporting time period the information is updated.
- This date verifies that the information given in this report has been updated by the project manager in the current reporting period.

Monthly Reporting – Review and update fields as needed

Although information in other PPM fields may change, the following fields typically need to be updated throughout the lifecycle of every project:

- Total Cost Planned
- Approved Finish Date
- Project Phase
- Project State