

State Government Council

Project Status Reporting Work Group

Meeting Notes -- March 21, 2000

Participants

Jerry Brown,

Bob Shanahan

Jon Ogden

Linda Salac

Jim McGee

Steve Schafer

Discussion centered on revisions to the draft guidelines for project status reporting. Changes included the following:

In several sections, the word "should" is used, which would generate uncertainty whether a particular action is required. The word "shall" will be used when an action is required, rather than optional.

Jerry Brown discussed the advantages of a final report, which presents "lessons learned" that could be shared with other agencies. This led to the concept of a project notebook, which would include other documents relating to the project. There was agreement that a project notebook and final report has merit, but goes beyond the immediate purpose of project status reports. Steve Schafer will expand the paragraph on "related policies..." to include the concept of a project notebook and final report. They will not become part of the requirements for project status reports.

"Current Activity Status" under "2. Content" should include the additional topics of change control and corrective actions.

There was considerable discussion regarding frequency of reporting. Monthly reporting to the CIO may be excessive for many projects, yet necessary for certain projects or during certain critical periods. Typically, internal project reporting would occur on a monthly basis, but changes from month to month would not provide meaningful information. Steve Schafer will revise this section to reflect these comments.

Changes to reporting format:

- project information: add a category for "type of project (feasibility study, etc.)"
- overall status: replace the current general statements with yes/no options indicating whether the project is on or ahead of schedule, budget, and within scope.

- Current Status: add clarifying instructions regarding the content for "accomplishments" that would incorporate milestones, tasks, and steps taken to mitigate problems
- Issues: add clarifying instructions to summarize any revisions to project budget, schedule or scope.
- Financial Status: make changes to make it clearer what information is required, including a listing of original approved budget and schedule and revised budget and schedule.
- Change the order of the sections: A. Financial Status; B. Issues; C. Current Status; D. Plans for Next Period.

There was discussion about how to implement the project status reporting requirements. Suggestions included:

- provide detailed instructions for filling out the form with sample reports
- provide an opportunity for face-to-face explanation of the form and procedures
- provide training on project management for small projects. The training should be consistent with PMI / PMBOK.
- provide a web site with instructions, frequently asked questions, and project management information

***The next meeting of the Project Status Reporting Work Group is Tuesday April 4 at 3p.m., same location.***