High-Level Stakeholder Monitoring of IS/IT Projects: A Flow Chart for Use in Public Sector Agencies

Christina Bower,
Thomas A. Darling, and
Michelle Lombardo

Government and Technology Division
Schaefer Center for Public Policy
University of Baltimore
1304 St. Paul St., Baltimore, MD 21202
(410) 837-6188

Draft Discussion Paper

Table of Contents

Introduction

A project is —

> *A coordinated effort, using a combination of human, technical, administrative and financial resources, in order to achieve a specific goal within a fixed time period.*

Although they share many of the same characteristics as day-to-day operations — both require resources and coordination — projects also are different:

- They are temporary structures, with a defined start and finish.
- They have a well-defined goal, and are mounted to achieve change.

There is no need to recount the myriad tales of failed IS/IT projects, both in the public and the private sectors. A project fails when it does not provide a product that meets the organization's needs. And, perhaps more often, although a useful product is delivered, it arrives well past the originally scheduled delivery date and substantially over budget. It is not surprising then that senior managers, agency executives, and other oversight bodies (*e.g.,* elected/appointed boards and legislative bodies) feel the need to closely monitor the pulse of IS/IT projects.

This report proposes a generic system for project monitoring in the public sector. We have not assumed any particular organizational form for either the IS/IT function (centralized or decentralized) within the agency, or the structure it uses to execute projects.

The project monitoring practices suggested here are expected to provide three primary benefits:

- Increased emphasis on feasibility studies and project planning leading to higher quality IS/IT projects and better estimates of project duration and cost.
- Earlier top management involvement in and better understanding of, IS/IT projects leading to better appreciation of risks and increased management support.
- Earlier detection of problems so that they can be expeditiously addressed.

High-Level Monitors

Given the difficulties often encountered during IS/IT projects, senior managers, agency executives, legislative bodies, and other investors naturally desire to monitor:

- the business problem (opportunity) the project will address, and the selection of a specific IS/IT technical solution to address the problem or opportunity.
- the progress of a project toward implementing that alternative.

The amount of interest shown by high-level monitors in a given IT project is likely to depend, among other factors, on the breadth of project scope and the cost, and risks, involved.

Three tiers of "high-level" monitors can usefully be distinguished –

- The parties most interested in the project are department-level managers – the manager(s) of the department(s) for which the initiative is being developed, referred to here as the *sponsoring department(s),* and the manager of the department providing the technical expertise, referred to here as the *developing department.* In some cases, these are one in the same.
- At the agency level, there are three potentially interested parties. The individual most likely to be closely involved in monitoring the project is the agency executive (or his or her designee). If the agency has an IT steering group, they also are likely to be interested in monitoring progress. And, if the project is important (or costly) enough, an agency oversight board may desire an active monitoring role.
- The same three potentially interested parties — executive, technology steering group, and oversight/legislative body — can also often be found at the enterprise level.

Not all projects will be of interest to all three tiers of monitors. Factors such as the "publicness" of the project, scope of the project and the associated risks will determine what level of monitoring is appropriate.

The Infernal Triangle

Project *scope & quality,* the *time* a project takes to complete, and the *money* required to complete it are the three main project variables that are constantly in tension — it is impossible to make a change in one without affecting the other two. If project scope expands, the project almost inevitably will cost more money and take longer to complete. To complete a project more quickly, either project scope will have to be reduced, or additional money invested. Project management involves the tracking of these elements.

The Project Lifecycle

It is important to carefully distinguish three terms that are sometimes used somewhat carelessly in the literature:

- The *project lifecycle* is concerned with the management aspects of the entire project, including communication, budgeting, scheduling, and strategic links to organizational mission.
- The *product (system) development lifecycle* is concerned with the technical aspects of creating or producing the product. It is a part, but only a part, of what is inside the project lifestyle management wrapper.
- The *product lifecycle* refers to the entire anticipated useful life of the product, up to and including dismantling and disposal. A software product lifecycle extends past the initial software development, into maintenance and upkeep.

While attention to all three lifecycles is important during a project, it is the project lifecycle we are most concerned with here. In fact, the proposed generic project lifecycle can be viewed as an

external “management” container for use with most well-known system development life cycles, including the IEEE’s strict systems engineering model, the use of overlapped phases, prototyping, spiral approaches, and the use of joint application development (JAD).

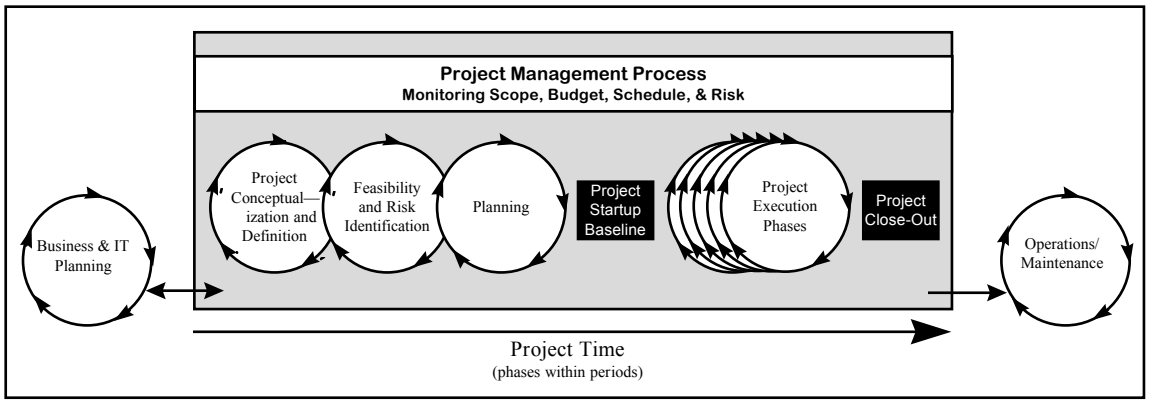
The Generic Project Flowchart

It is typical to divide projects into two or three major *periods,* with each period further subdivided into *phases.* Each phase involves *activities* that produce one or more *deliverables.* At the conclusion of each phase is a *control gate,* at which interested parties review (and, hopefully, approve) the phase deliverables.

Our generic project model defines only two periods —

- a study period, and
- an execution (some prefer performance) period.

In a broad sense, these correspond to "plan" and "do," but the distinction is not always crystal clear. For example, activities may occur during the study period that directly contribute products to the execution phase, or certain activities ordinarily performed in the study period may be delayed pending the results of deliverables produced during the execution period. Sometimes this overlap is unavoidable, at other times it is encouraged as a way to speed up the project. In either case, the risk of escalating costs or schedule delays from re-work is increased.



Source: Adapted from *Project Management Methodology,* California Department of Information Technology.

Figure 1. High-level view of the project management process (lifecycle).

Study Period

The project begins after a business problem (or opportunity) has been identified (most often through the business and/or IT planning process), and a determination is made that provides a possibility for improved agency performance. In broad terms, the three generic phases correspond respectively to identifying: user requirements; system requirements; and, project tasks, cost, schedule, and risks.

During this phase, high-level monitors will be actively interested in reviewing the deliverables from each phase (see Table 1).

Execution Period

Given the wide-range of "things" a project can be used to create, produce, or procure, as well as different approaches to accomplishing the task, it isn't possible to specify generic phases for the

execution period. Instead, the phases are best specified as part of the project plan created during the study period.

This does not matter in terms of high-level project monitoring. During the execution period, high-level interest is not so much in the deliverables created during a given phase, but in deviations of the project's scope, schedule, or budget from the *baselines* contained in the previously approved project plan. Except for senior managers from the sponsoring and developing departments, there is unlikely to be any high-level interest in attending end-of-phase control gates reviews of product deliverables.

IS/IT Project Flow, Deliverables, and Control Gates			
Pre-Project Period			
Phase	***Activities***	***Products***	***Control Gates (Level #)***
Identification	Identify problem.	Problem Statement.	**Problem Review**
Study Period			
Phase	***Activities***	***Products***	***Control Gates (Level #)***
Project Conceptualization and Definition	Identify user requirements. Prepare business case.	Business Analysis. Planning Plan.	**Concept Review**
Feasibility and Risk Identification	Identify system requirements. Generate & evaluate alternative solutions.	Feasibility Study Report (FSR).	**Solution Selection Approval**
Planning	Explicitly define project scope. Create budget. Create schedule. Prepare detailed project risk assessment.	Project Management Plan	**Departure Approval**
Execution Period			
Start-up			
Activities necessary for execution as specified in the project plan.	As specified in plan.	As specified in the plan.	**Control gate to review deliverables**
Close-out			

Table 1. IS/IT project flow, deliverables, and control gates.

Project Monitoring During the Study Period

High-level management review during the study period is accomplished through approval of the deliverables created for each study phase. The three generic phases move to specify with increasing detail

(i) the user requirements and anticipated benefits;

(ii) the system requirements, alternative (technical) solutions, and a recommended specific solution; and,

(iii) a detailed plan for executing the project, including careful identification of all project tasks, risks, budget, and schedule.

Logically, the order of these phases is important. It is difficult to identify plausible alternative technical solutions, much less select a single one, until user requirements are well specified. It also is difficult to make quality estimates of budget, schedule, or risks until a technical approach has been selected and relevant tasks identified. Thus, although each phase addresses, to some extent, the full range of project concerns, each phase also has a specific focus.

It is not uncommon for discoveries at a later phase to require a return to an earlier phase. Because it is better to take a step back during the study period than encounter unforeseen difficulties during the execution period, the study phases should be viewed as interconnected. However, careful attention to the order in which the phases are completed reduces the likelihood of wasted effort.

Initial Identification (Pre-Project Period)

When a project is identified during the pre-project period, an Initial Project Statement similar to that shown in Appendix A should be completed. Notice that this form is only a slightly more detailed version of the Business Initiative Description and Justification discussed in the strategic information systems planning document.

Project Conceptualization and Definition

The goal during this phase is to provide a complete and clear understanding of the business problem (opportunity) the project is asked to address. In other words, the focus of this phase is on project scope. A determination regarding user requirements is logically *a priori* to identifying feasible technical solutions and assessing their relative benefits.

It is generally beneficial during this phase to identify a somewhat broader range of user desiderata than it is anticipated the final project will address, with a clear distinction drawn between mandatory and optional user requirements. The benefits derived from the various requirements must be carefully enumerated, so that a rational choice can be made in the next phase regarding which of the optional requirements will be met. Although the business analysis required in this phase is quite detailed, it is <u>not</u> the definitive statement of project scope. That must await the results of the (technical) feasibility study.

Notice that this phase also may include the production of a "Planning Plan," a document that outlines a time frame and, if necessary, a budget for the remainder of the study period.

Both the business analysis and planning plan should be reviewed during a joint meeting of the interested participants (sponsor and developer), and high-level monitors as warranted by the complexity and importance of the project effort.

Feasibility and Risk Identification

The purpose of the feasibility study is to identify and compare plausible technical solutions to the business issues identified during the conceptualization phase. The scope of the feasibility study will vary depending on project size, complexity, risk, and anticipated cost. The feasibility study is undertaken to —

- Assure the managers of the sponsoring department(s) and the developing department that technology solutions can be found and program requirements met.
- Assure high-level monitors that the recommended alternative represents a sound decision.

The Feasibility Study Report

The feasibility study report (McLeod & Smith 1996:22-23) should include the following —

- An *executive summary* including:
  - ⇒ Objectives of the study, and a description of business problem/opportunity.
  - ⇒ The scope of the study.
  - ⇒ The possible courses of action identified, and the advantages and disadvantages of each.
  - ⇒ Recommendations
- A complete description of the *decision criteria* used to determine the feasibility of generated alternatives, and to compare them. This should include how information was obtained, assumptions used, and a discussion of data reliability and likely sources of error.
- An outline of the *business and technical requirements* any proposed solution must meet, including clear definitions for any terms used, and criteria for success.
- A detailed description of the *alternatives* considered, including —
  - ⇒ <u>Operational Attributes:</u> What is unique about the alternative in terms of its operational behavior.
  - ⇒ <u>Economic Implications:</u> How does the alternative compare to others in terms of cost and cash flow.
  - ⇒ <u>Technical Approach:</u> What are the unique technical features of the alternative; how is it superior or inferior to other alternatives.

  - ⇒ Risk Attributes: A discussion of risks uniquely associated with this alternative, as well as ways they might be controlled.
  - ⇒ Organizational Implications, including training and changes in job functions.
- *Comparison of Alternatives on Criteria,* preferably using graphs and tables.
- *Recommendation,* including a preferred option and a second choice. (Recall "do nothing" or "no feasible solutions" are legitimate recommendation.)

A common misunderstanding arises regarding the accuracy of estimates generated during this phase. Although estimates of risk, time, benefit, and cost are required for each of the alternative solutions considered, for the purposes of this stage, they do not necessarily have to be accurate! Instead, all that is required is that they be sufficiently consistent to provide a basis for evaluating the various alternative solutions *vis-à-vis* each another. The final decision to go ahead with the project is best left for cost, time, and risks assessments based on the detailed task analysis for the selected technical solution developed during the next phase.

Project Planning

The goal of this phase is to create a management summary document that gives the essentials of a project in terms of its objectives, justification, and how the objectives are to be achieved. It describes how major tasks will be accomplished, and resource requirements — people, time, and costs — associated with each task. The project plan evolves through successive stages of increasingly detailed specification, often through the use of a work breakdown structure (WBS).

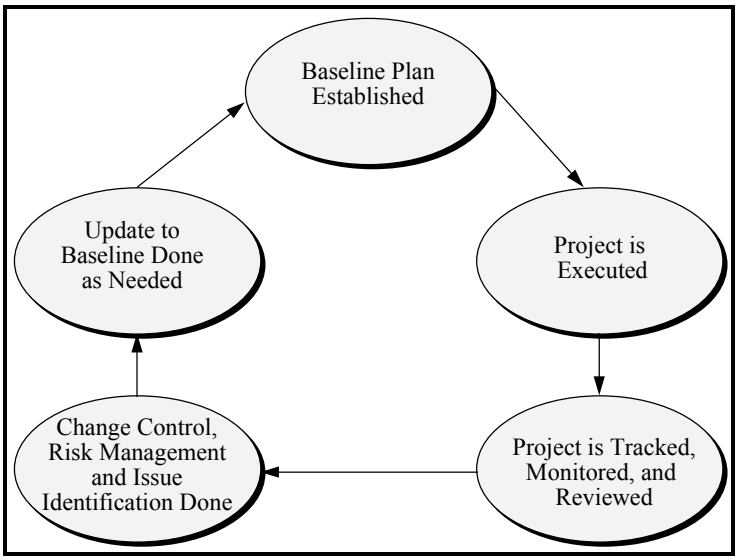
The WBS involves a hierarchical decomposition of execution period phases into tasks and activities within tasks. The WBS forms the basis for estimating the project schedule and budget. Detailed estimates of time requirements for each activity, including dependencies among the identified tasks and activities, and cost estimates (including both monetary and resource requirements) are performed at the lowest level of the hierarchy, and aggregated to provide overall project information.

It is not always necessary (or possible) to provide the same level of detail for later execution period phases as earlier ones. However, to the extent tasks involved in later phases are less detailed, the time and cost estimates are likely to be less accurate.

The project scope statement, schedule, budget, and risk assessment included in the project plan provide the details necessary for high-level monitors to approve starting the project, as well as the *baselines* against which on-going project performance will be measured.

Project Monitoring During the Execution Period†

The scope, schedule, budget and risk assessments from the project plan serve as the bases for the project's monitoring, controlling, and reporting activities. Once a project has advanced to the execution (performance) period, a consistent and constant flow of information on the true status of the project is essential. By collecting relevant data for the status meetings and reports, information will be available to accurately identify issues and problems early, minimize project risks, and monitor, control, and report progress.



Source: *Project Management Methodology,* California Department of Information Technology.

Figure 2. Project management during the execution period.

The critical elements for project management during the execution period are:

- Tracking project activities to compare actual performance to planned performance.
- Reviewing and communicating status and future actions on both a formal and informal basis to appropriate stakeholders.
- Monitoring and taking steps to mitigate potential risks.
- Following the change management process to control changes to the project's objectives, specifications, and overall definition.
- Following the issue tracking process to ensure that there is a central repository for project issues that are addressed in a timely fashion.

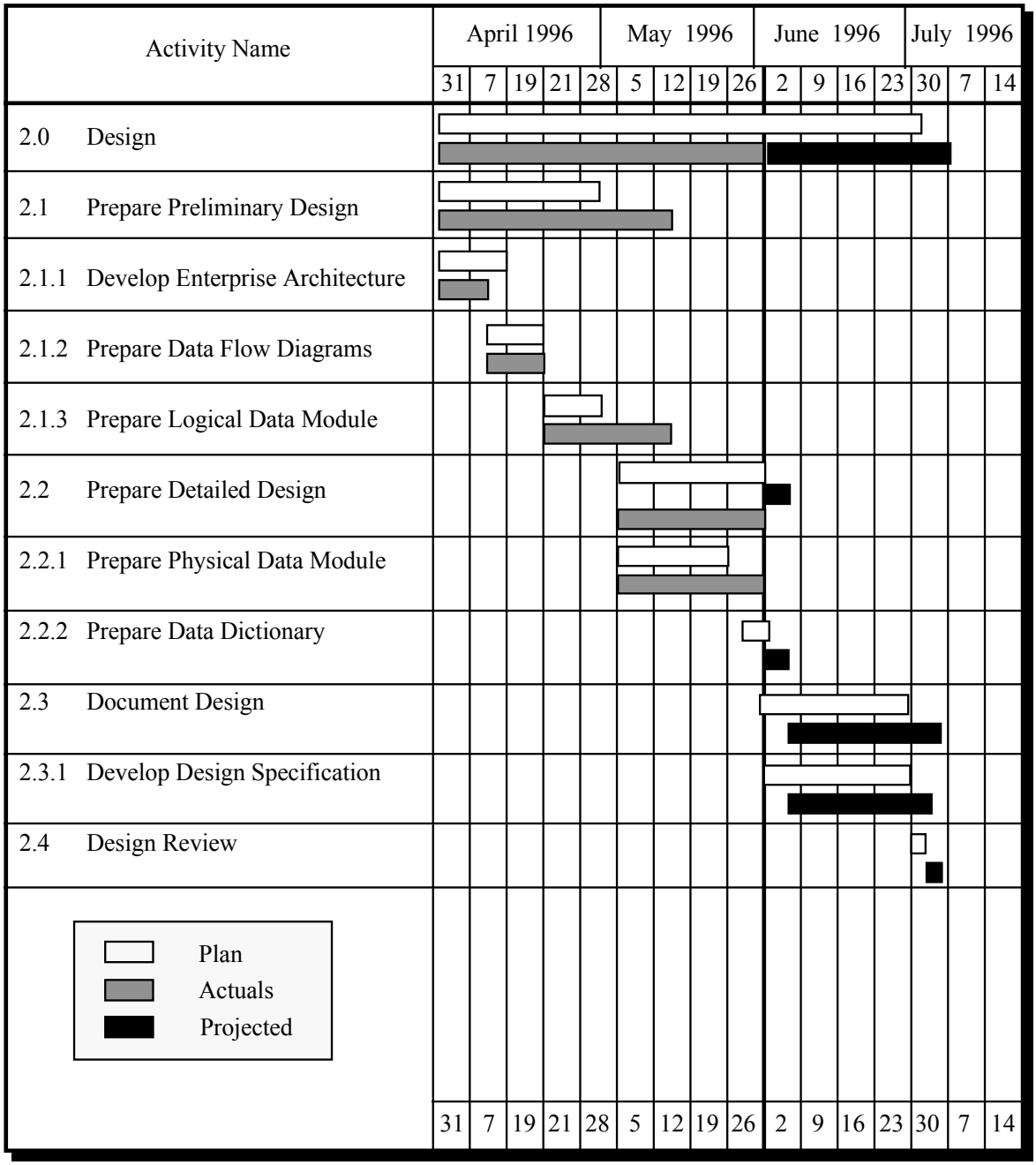
---

† Portions of this section rely extensively on material provided in *Project Management Methodology,* California Department of Information Technology.

Executive Status Report

This section deals specifically with preparing executive status reports — the primary means of communication with high-level monitors during the execution period. The purpose of the status reports is to keep monitors apprised of adherence or deviations from the three major project variables: project scope; time (schedule); and, cost (budget).

Executive status reports are usually provided on a quarterly basis, although they may be required



Source: *Project Management Methodology,* California Department of Information Technology.

Figure 3. Gantt chart showing project schedule, planned, actual, & projected.

monthly for projects that are inherently high-risk or having problems. The initial period should be agreed to during project plan approval. An example of a possible format for a single-page Executive Status Report is shown in Appendix B.

If the project is being run according to standard project management practices, creation of executive status reports require little additional effort. (Standard practice requires that the necessary information be kept up to date, and included in project status reports, containing much the same information, prepared every two weeks.)

Examples of common attachments to the executive status report are discussed below. The format of these examples should not be treated as definitive; most project management software is capable of creating similar (although not identical) tables. It's the information, not the format, that counts.

Schedule Monitoring

Project Schedule Update

The easiest way to show how the project schedule is proceeding is through a Gantt chart reflecting both the original schedule, the actual time for completed tasks, and updated projections for tasks not yet complete. An example is shown in Figure 3; the dark vertical line reflects the date the schedule was generated. (The example is a little too detailed for the Executive Summary Report; a higher level of task aggregation would be better.)

Activity Tracking Table

The activity tracking table (shown in Figure 4) provides a somewhat different view of schedule information. Although the activity tracking table appears more detailed, it relies on the same underlying tracking information as the Gantt chart, and with project management software, often

WBS	Activity Description	Depend	Owner	Planned Schedule			Actual Schedule			Target Schedule		
				Start	Finish	Dur.	Start	Finish	Dur.	Start	Finish	Dur.
2.0	DESIGN	1.0	Brown	4/1/96	7/1/96	91	4/1/96	7/1/96	91	4/1/96	7/5/96	95
2.1	Prepare Preliminary Design		Brown	4/1/96	5/1/96	30	4/1/96	5/15/96	45	4/1/96	5/15/96	45
2.1.1	Develop Enterprise Architecture		Brown	4/1	4/10	10	4/1	4/10	10	4/1	4/10	10
2.1.2	Prepare Data Flow Diagrams		Brown	4/10	4/20	10	4/10	4/20	10	4/10	4/20	10
2.1.3	Prepare Logical Data Module		Brown	4/20	5/1	10	4/20	5/15	25	4/20	5/15	25
2.2	Prepare Detailed Design	2.1	Brown	5/5	6/1/96	26	5/15			5/15	6/5/96	21
2.2.1	Prepare Physical Data Model		Brown	5/5	5/25	20	5/15	5/31	15	5/15	5/31	15
2.2.2	Prepare Data Dictionary		Brown	5/25	6/1	6	5/31			5/31	6/6	7
2.3	Document Design	2.2	Brown	6/1	6/28/96	28				6/6	7/2	27
2.3.1	Develop Design Specification		Brown	6/1	6/28	28				6/6	7/2	27
2.4	Design Review	2.3	Jones	6/30/96	7/1/96	2				7/3/96	7/5/96	2
Comments: *All activities that are not meeting planned dates need to define: reason, approach to bring into conformance, and impact.*												

Source: *Project Management Methodology,* California Department of Information Technology.

Figure 4. Example activity tracking table.

is no more difficult to produce.

Fields in the activity tracking table include:

- **WBS number.** This should be the activity's work breakdown structure number.
- **Dependency.** This would apply when either the start or finish of one activity depends on the completion of another. In this example, Task 2.2 cannot start until Task 2.1 has been finished. Similarly, Task 2.3 depends on Task 2.2, and Task 2.4 depends on Task 2.3.
- **Owner.** The individual responsible for updating the status on the task.
- **Planned Schedule.** This information was generated as part of Project Planning.
- **Duration.** For the purposes of scheduling, duration should be in days, not hours. *N.B.,* the purpose of the information in this table is not to show the number of people and hours being spent on a task (effort), but the actual time it will take.
- **Actual Schedule.** This information is filled in as activities are completed.
- **Target schedule** is the planned schedule, plus the actual, with adjustments based on new project knowledge. In this example, the design of the project was to take 90 days. The current tasks have taken 15 days more than originally anticipated. During the planning phase, the project manager allowed a few days "float" in the design as a reserve for schedule risk.

Budget Monitoring

A summary of anticipated to actual expenditures is usually included in the Executive Summary Report.

Estimate at Completion (EAC)

The traditional budget summary, which only looks at the past, can obscure identification of project problems. The Estimate at Completion, see Figure 5, provides an alternative view, with a balanced report on actual past, and anticipated future expenditures.

The EAC is based on an assessment of cost (direct and effort) required to *complete* the project. It (re-)estimates the costs required to complete each task and adds that estimate to the costs incurred to date to derive the anticipated cost of each task. Again, it is the long-range view and information, not the specific format, that matters.

If it is discovered that the total available funds are less than the estimated total cost, then corrective action must be taken. Alternatives include —

- Re-cost the project.
- Eliminate unneeded or excessive requirements until the remaining estimated cost is within the bounds of the remaining funds.

WBS	Activity Description	Analysis in Hours						Analysis in Dollars				
		Res #	Budget hours	Actual hours	Est to Complete	Est @ Complete	Variance (+=More)	Budget hours	Actual hours	Est to Complete	Est @ Complete	Variance (+=More)
2.0	DESIGN											
2.1	Prepare Preliminary Design	3	900	1,150	0	1,150	250	90,000	115,000	0	115,000	25,000
2.1.1	Develop Enterprise Architecture		400	500	0	500	100	40,000	50,000	0	50,000	10,000
2.1.2	Prepare Data Flow Diagrams		300	250	0	250	(50)	30,000	25,000	0	25,000	(5,000)
2.1.3	Prepare Logical Data Module		200	400	0	400	200	20,000	40,000	0	40,000	20,000
2.2	Prepare Detailed Design	5	1,000	640	408	1,048	48	100,000	64,000	40,8000	104,800	4,800
2.2.1	Prepare Physical Data Model		600	600	8	608	8	60,000	60,000	800	60,800	800
2.2.2	Prepare Data Dictionary		400	40	400	440	40	40,000	4,000	40,000	44,000	4,000
2.3	Document Design	2	430	0	430	430	0	43,000	0	43,000	43,000	0
2.3.1	Develop Design Specification		430		430	430	0	43,000	0	43,000	43,000	0
2.4	Design Review	10	160									
	Total for the Project		4,820	3,620	1676	5,256	646	466,000	358,000	167,600	525,600	59,600

Source: *Project Management Methodology,* California Department of Information Technology.

Figure 5. Example estimate at completion.

Bibliography

Forsberg, K., H. Mooz, & H. Cotterman (1996). *Visualizing Project Management.* New York: John Wiley & Sons.

McLeod, G., & D. Smith (1996). *Managing Information Technology Projects*. Danvers, MA: Boyd & Fraser.

Project Management Institute (1996). *A Guide to the Project Management Body of Knowledge.* Sylva, NC: PMI Communications.

Appendix A
Initial Problem Statement (IPS)

A. General Information

Information to be provided in this section is general in nature and provides necessary information about the problem and potential project.

Project Name:		***Date:***	
Sponsoring Department:		***IPS Prepared By:***	
Development Department:		***IPS Prepared By:***	

Please answer the following questions by marking "Yes" or "No" and providing a brief response as appropriate	***Yes***	***No***
Is this an updated Initial Problem Statement? Is so, reason for update:		
Is this project identified in the agency's IT strategic plan? If not, explain how it is consistent with agency mission and priorities:		
Does the concept development effort require funding? If yes, amount and source:		
Is this a follow-on to a previous project? If "yes," please provide: Name of previous project: Date Completed:		

Points of Contact.

Please list the individuals who will be responsible for this project during its initial conceptual and planning stages, as appropriate. This will be the group of individuals that meets to review and discuss the business analysis, project statement and feasibility study.

Position	Name/Organization	Phone	E-mail
Project Manager (if known)			
Sponsor's Senior Management Rep.			
Developer's Senior Management Rep.			
Sponsor's Direct Representative			
Developer's Direct Representative			
Other Stakeholders (Top 3):			

Initial Problem Statement (IPS), continued.

B. Problem Statement:

Business Problem or Opportunity.

All projects start with a business problem/issue to solve or opportunity to exploit. Highlight any known business deadlines.

Tradeoffs.

Please rank the priority of the following —

_____ Project scope and/or quality

_____ Cost

_____ Schedule

Potential Benefits.

Provide a brief, concise list of what the project hopes to accomplish and factors that might be used to determine project success.

Limits in Scope of Problem to be Considered.

The statement should be short and to the point. It should provide clear limits for defining the scope of user requirements considered in the conceptualization phase.

Preliminary Risk Identification.

Identify potential risks involved in this problem. Describe potential significant changes that will be required in your existing workflow, your organization, or by your clients. Identify any moral/ethical or legal issues the project is likely to encounter.

Related Projects (if known).

Initial Problem Statement (IPS), continued.

C. Strategic and Background Information:

Business Area or IT Area Affected. *Check all appropriate functions.*

☐ Project Management	☐ Planning
☐ Document Tracking	☐ Program-specific Data Manage. system
☐ Human Resources	☐ Procurement
☐ Workflow Management	☐ Help Desk
☐ Financial	☐ Year 2000
☐ Desk Top Productivity	☐

Other comments/limits on business functions to be considered:

Types of Technology. *Identify technology areas that might apply to this project. Check all appropriate categories.*

Please check all appropriate boxes that **might** be used to address the business issue.	
Productivity/Reengineering	
☐ Imaging/Workflow	☐ Outsourcing/Professional Services
☐ Electronic Data Interchange (EDI)	☐ Systems Integration
☐ CASE Tools	☐ Downsizing/Migration
Client Applications	
	Public Access
☐ GIS/Mapping	☐ Internet Applications
☐ Design/Engineering	☐ Intranet Applications
☐ Database Management	☐ Interactive Voice Response
☐ Publications/Pre-press	☐ Kiosks
☐ Electronic Mail	
Information Systems	
☐ Network Development	☐ Security/Disaster Recovery
☐ Network Management	☐ Client/Server
Education, Training, and Management	
☐ Training/Education	☐ IRM Planning
☐ Software Asset Management	☐ Project Management

Other comments/limits on technology solutions to be considered:

Initial Problem Statement (IPS), continued.

D. Tentative Study Period Financial and Schedule Information:

Project Conceptualization Phase			
Estimated Budget	*Low:* *High:*	*Estimated Start Date:*	
Estimated Work Hours:		*Estimated Completion Date*	
Fiscal Year 1 Dollars		*Fiscal Year 2 Dollars*	
Feasibility & Risk Identification Phase			
Estimated Budget	*Low:* *High:*	*Estimated Start Date:*	
Estimated Work Hours:		*Estimated Completion Date*	
Fiscal Year 1 Dollars		*Fiscal Year 2 Dollars*	
Planning Phase			
Estimated Budget	*Low:* *High:*	*Estimated Start Date:*	
Estimated Work Hours:		*Estimated Completion Date*	
Fiscal Year 1 Dollars		*Fiscal Year 2 Dollars*	

Notes:

A small amount of high-level planning information should be provided with this project statement if any sizable effort of business analysis or planning needs to be completed. If not, this section may be omitted.

Provide a rough list of activities to complete during the study period. There should be approximately 3 to 10 tasks.

Activity #	# of Days	Estimated Cost	Activity Description	Milestone
etc.				

Attach a schedule for these tasks if available.

Appendix B
Executive Status Report

Project:_____ **Date:**_____

Submitted by:_____ Project Organization Area:_____

Project is: ☐ On Plan ☐ Ahead of Plan ☐ Behind Plan

Reporting Period: From: ___/___/___ To: ___/___/___

Current Status:

Significant Accomplishments This Report Period:

Open Action Item Summary:

Executive Summary Report, continued.

Milestone Status:
Deliverables Completed Since Last Review:
Status of Upcoming Deliverables:

Financial Status:
Planned Versus Actual Costs: *Planned Versus Actual Schedule:* *EAC Projection:*

Summary of Technical Status/Issues:
Requirements: *Design:* *Development:* *Testing:* *Integration:* *Quality*

Last Risk Update. Highlights: