Washington State
Department of Transportation

Progress Reporting Guidelines

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Introduction

This paper provides guidance and examples of items to be addressed in monthly progress reports submitted by Service Providers to projects including WSDOT Specialty Offices and Consultants. With the implementation of the Project Management and Reporting System (PMRS), WSDOT Specialty Offices and Consultants are required to establish a written agreement covering the scope, schedule and budget of the effort performed for each project and to monitor the status of those agreements on a monthly basis. One requirement is the preparation and submission of a written monthly progress report to the Project Manager (PM) for review and approval. The following elements are required for inclusion in monthly progress reports. In the case of Consultants, the signed agreement between WSDOT and the Consultant takes precedence over the information included in this guidance document. A sample monthly progress report is attached.

Progress Report Elements

The following items should be addressed in each monthly progress report submitted by WSDOT Specialty Offices and Consultants:

1. Overall Agreement Status
   a. Scope
      - Confirmation that agreement scope has not changed, or
      - Identification of actual or potential scope changes along with the estimated impact to the agreement scope, schedule and budget.
      - Reasons for changes and options for mitigating the impacts of changes.
   b. Schedule
      - Confirmation that agreement schedule has not changed, or
      - Identification of actual or potential schedule changes along with the estimated impact to the agreement scope, schedule and budget.
      - Reasons for changes and options for mitigating the impacts of changes.
   c. Budget
      - Comparison of actual costs to planned budget by Control Account along with an explanation of any cost variances.
      - Inclusion of an up-to-date Estimate at Completion (EAC) and variance analysis if EAC differs from agreement budget.
      - Identification of actual or potential budget changes along with the estimated impact to the agreement scope, schedule and budget.
      - Reasons for changes and options for mitigating the impacts of changes.

2. Accomplishments for Month

- Key accomplishments or deliverables achieved during the month in relationship to current agreement (original and approved modifications).
- Progress made toward satisfying other agreement requirements.

3. Upcoming Activities for Next Month
   - Key activities planned or deliverables anticipated to be completed during the upcoming month or beyond.
   - Potential issues that may affect the Service Provider's ability to meet the agreement scope, schedule and budget.

4. Potential Changes
   - Identify potential changes to agreement scope, schedule or budget. Significant issues should also be brought to the attention of the Project Manager as soon as identified.
   - Status of agreement change management (approved and potential).

5. Risk Update
   - Identify new agreement risks and update previously identified risks from the Project Management Plan (PMP) including suggested risk mitigation/management strategies.
   - Evaluation of ongoing risk strategies (successes/failures, if project risks have occurred is the strategy working?).

6. Issues, Concerns or Pending Decisions/Actions
   - Identify new issues and/or concerns that may potentially impact the agreement scope, schedule and budget that have not been previously addressed.
   - Evaluate the impact to the agreement and identify strategies taken/planned to mitigate the impacts.
   - Continuously update previously identified issues until resolved.