



# CDC UNIFIED PROCESS PRACTICES GUIDE



## PROJECT STATUS REPORTING

### Purpose

The purpose of this document is to provide guidance on the practice of **Project Status Reporting** and to describe the practice overview, requirements, best practices, activities, and key terms related to these requirements. In addition, templates relevant to this practice are provided at the end of this guide.

### Practice Overview

Effective communication is a key component of successful project management and delivery. Eighty percent of a Project Manager's job revolves around communication with the project team, client, and executive management. Without effective communication vital information may not be exchanged effectively, or not at all. A lack of communication may even delay or prohibit the execution or completion of scheduled tasks. By dealing effectively with communication issues the probability of project success increases exponentially. Project status reporting is one method of addressing the importance of project communication.

Project status reporting is a regular, formalized report on project progress against the project plan. Its purpose is to effectively and efficiently communicate project status at regular intervals to project stakeholders. Good, consistent, project status reporting helps guard against unexpected surprises to project sponsors and other stakeholders. It keeps project stakeholders informed of critical aspects of project health such as schedule, issues, scope, resources, cost, etc and allows management to take action to address project issues and risks.

Project status reports can also be used to provide a documented history of the project. This can then be applied to strengthen lessons learned and to evaluate, review, and learn from how the project succeeded and where it may have had difficulties.

Objectives of effective project status reporting include:

- Improve communication of information within the project and across the organization
- Simplify the process of gathering and disseminating project information
- Ensure that stakeholders receive necessary information
- Communicate key messages about project progress
- Improve organizational support for the project

Reporting requirements and frequency of reporting vary from project to project depending on factors such as expectations of information distribution by management and project stakeholders, project size, complexity, risk, etc. Identifying what information project teams and stakeholders need in addition to basic project status reporting information is a process that takes place early in the project life cycle and most likely will evolve as the project progresses.

Project status is usually reported by the Project Manager to higher organizational levels such as a steering committee, executive sponsor, senior managers, etc. However, status reporting can also be to individuals or committees that are part of the project such as team leads, quality managers, and other project staff. The finalized project status reports should be shared and distributed to the project team and stakeholders as defined within the project's communication management plan.

It is important to note that formal status reporting is not a substitution for ongoing project communication between the project manager, project team, client, senior management, and any other parties needing updated project information. Status reports are simply a formal document summarizing the projects progress since the last formal status report was distributed.



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Project status reporting is a project management monitoring and controlling function that is performed iteratively throughout the life of the project and typically includes:

- General project information such as project name, project manager, number of resources, etc.
- General status report information such as date, author, legend, etc.
- Executive milestone overview
- Project summary status
- Project milestone status
- Planned accomplishments status
- Internal/External Integration milestone status
- Project issue summary
- Project risk summary
- Project metrics

Project status reporting is usually conducted as a roll-up process. Team members report informal status or individual task status to team leads. Team leads then report a rolled-up departmental status to the project manager. This status may be formal or informal depending on the project manager's needs and/or requirements. The project manager then rolls-up each departmental status into a formal project status report to senior management and other project stakeholders.

### Best Practices

The following best practices are recommended for the practice of **Project Status Reporting**:

- **Communication** – Incorporate Project Status Reporting as one component of the project's overall Communication Management Plan
- **Consistency** – Be consistent in format, distribution cycle, distribution method, etc.
- **Establish Metrics** – Establish metrics for status reporting during the project's planning phase.
- **Process** – Establish a project reporting process with the project team based on the information needs of the status reporting audience
- **Simple** – Keep status reporting simple but effective.
- **Ensure/Verify** – Ensure that all interested parties are receiving necessary information
- **Standards** – Establish and use a standard process and template for reporting project status
- **Use Tools** – Utilize tools when available to simplify the status reporting process and to more effectively meet the information needs of the project audience

### Practice Activities

For software development projects the following practice activities are appropriate:

- **Communication Planning** – Develop a Communication Management Plan for the project. Part of that plan should include a process for project status reporting
- **Identify** – Identify the information needs of each status reporting audience
- **Needs** – Determine who needs what information, when, and in what format
- **Sources** – Identify sources of information for developing the project status report
- **Responsibility** – Assign responsibility for obtaining information needed for reporting status
- **Distribution** – Identify the best methods of distribution for each type of project recipient
- **When** – Define when status reports will be distributed and by whom
- **Approval** – Document the approval process, if needed, for any specific types of communication
- **Process** – Develop a process for handling ad hoc requests for project information
- **Distribute** – Distribute project status information as defined in the project's Communication Management Plan



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### Practice Attributes

This section provides a list of practice attributes to help project teams determine when and how the practice of **Project Status Reporting** impacts a project.

<b>Practice Owner</b>	CDC UP Project Office – NCPHI
<b>Criteria</b>	All projects regardless of type or size should have some type of communication management plan that includes reporting regularly on project status.
<b>Estimated Level of Effort</b>	Moderate
<b>Prerequisites</b>	N/A
<b>Practice Dependencies</b>	N/A
<b>Practice Timing in Project Life Cycle</b>	Developing a Communication Management Plan is an activity that takes place during the planning phase of the project life cycle. Status reporting is a considered part of this process. The practice of status reporting then continues throughout the life of the project.
<b>Templates/Tools</b>	Project Status Reporting Practices Guide, Project Executive Status Reporting Template, Project Executive Status Reporting Template Instructions, Project Status Reporting Checklist
<b>Additional Information</b>	N/A

### Key Terms

Follow the link below to for definitions of project management terms and acronyms used in this document.  
<http://www2.cdc.gov/cdcup/library/other/help.htm>

### Related Templates/Tools

Below is a list of template(s) related to this practice. Follow the link below to download the document(s).  
<http://www2.cdc.gov/cdcup/library/matrix/default.htm>

- Project Status Reporting Template
- Project Status Reporting Template Instructions
- Project Status Reporting Checklist