**Iterative Project Report for Programs & Multi-Year Phased Projects**

Submitted to Project Oversight on mm/dd/yyyy

This version of the major project legislative report is to be used for programs which contain a group of multiple, related projects that are designed to achieve a strategic vision and which are managed in a coordinated fashion. Additionally, this report may also be used for single projects that have a long duration and multiple, complex components that are best delivered in phases (or iterations). For this report it is assumed that the complexity and duration of the entire program or multi-phase project is too large to accurately estimate costs and durations for the full effort. Therefore, baselines may be established for the current project or phase only. The current project or phase must complete with the delivery of a functioning, usable production product. When the current project or phase meets its delivery and is accepted as usable, it must be evaluated and a lessons learned process must be conducted. Then the next project or phase may be planned, baselined and executed. At any of these “stage gates” a subsequent project or phase may also be cancelled should it be deemed that current solutions will not appropriately meet business objectives, or if required additional funding is not secured.

# General INformation

**Program/Project Name:** Add text here.

**Agency Name:** Add text here.

**Project Sponsor:** Add text here.

**Project Manager:** Add text here.

# Project Description

Add text here.

Hint: copy this from the Executive Summary Section of the Project Plan, as that should be a short comprehensive description.

# Business Needs

Add text here.

Copy from the project charter.

# Program/project Format

**Program/Project Start Date:** Add text here.

**Budget Allocation at Time of Initial Start Date:** Add text here.

**How Many Phases Expected at Time of Initial Start Date:** Add text here.

**Phase Approach Description:** Add text here.

**Estimated End Date for All Phases Known at Time of Initial Start Date:** Add text here.

# Program/project Road Map

The program road map shows the high-level plan or vision for the program/projects/phases. It is intended to offer a picture of the lifespan of all the effort that is expected to be required to achieve the business objectives.

| **Project/ Phase** | **Title** | **Scope Statement** | **Estimated Months Duration** | **Estimated Budget** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Project 1 | Name for the project or phase | What the project or phase will produce | xx | $0 |
| Project 2 |  |  |  |  |
|  |  |  |  |  |

If this report is for a program, list the projects. If it is a single project, list the phases or iterations (modify the wording in the “Project or Phase” column accordingly). Items may be modified in the future as long as the reasoning and ramifications are outlined below in the notes area.

**Notes:**Add text here, if necessary.

# Project Baselines

The baselines below are entered for only those projects or phases that have been planned. At the completion of a project or phase a new planning effort will occur to baseline the next project/phase and any known actual finish dates and costs for completed projects/phases will be recorded. The iterative report will be submitted again with the new information.

| **Project/ Phase** | **Project/ Phase Start Date** | **Baseline End Date** | **Baseline Budget** | **Funding Source** | **Actual Finish Date** | **Schedule Variance** | **Actual Cost** | **Cost Variance** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |
|  |  |  | $0 |  |  |  |  |  |
|  |  |  | $0 |  |  |  |  |  |
|  |  |  | $0 |  |  |  |  |  |

Project or Phase: If this report is for a program, list the projects. If it is a single project, list the phases or iterations (and adjust the wording accordingly). This column is a repeat of what you listed in the project roadmap.

Project/Phase Start Date: The date any work started on the project or phase. **For the first project or phase, this date would be the first date that work on the entire program began (e.g., team began working on the charter, or an RFI, or an RFP).**

Baseline End Date: The project/phase execution baselined end date.

Baseline Budget: The baselined budget for the project/phase (which may or may not match certain funding allocations or accounting budgets). This figure should include any risk contingency, but does not include management reserve. Risk contingency is for “known unknowns” and is a calculated cost added to a budget, whereas management reserve is extra funds held by the executive team to be used in case of emergency. This figure should also include what was spent on planning and closing/retrospective activities (note that variance is calculated only on execution activities).

Funding Source: Note which of the following will fund the project

* Federal – funding provided by a federal grant or federal entity
* State – funding provided by the state legislature
* Special – funding provided by other means (often agency fees or private grant)

Actual Finish Date: The date that the execution phase of the project/phase ends. Note: there may or may not be a time gap between actual finish dates and baseline start dates to account for retrospectives/lessons learned and new planning activities.

Schedule Variance: The final schedule variance at the end of the project/phase execution phase. Schedule variance is only measured on the execution phase (e.g., for those activities that operated under an approved plan)

Actual Cost: The actual expenditures for the project/phase. Includes all expenses from planning through retrospective/lessons learned/closeout.

Cost Variance: The final cost variance at the end of the project/phase execution phase. Cost variance is only measured on the execution phase (e.g., for those activities that operated under an approved plan)

**Notes:**

Add text here, if necessary.

If the project/phase re-baslined, include information on the original end date and/or budget and the variance to that original schedule and/or budget. If multiple funding sources are noted, explain the breakdown here.

# Objectives

Business objectives and measurements come from the project charter. In a program or multi-phased project of this size, certain objectives will be realized during certain project or phase rollouts. As objectives are measured, add those outcomes to this report so they can be shared along with new baselines for newly planned projects/phases. Realizing and measuring success is an important factor in continuing to expand on any program/project.

| **Project/ Phase** | **Business Objective** | **Measurement Description** | **Met/ Not Met** | **Measurement Outcome** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Project 1 |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# KEY LESSONS LEARNED AND SUCCESS STORIES

A lessons learned effort is performed after each project or phase is completed. This process uses surveys and meetings to determine what happened in the project/phase and identifies actions for improvement going forward. Typical findings include, “What did we do well?” and “What didn’t go well and how can we fix it the next time?”

If you have a lot of lessons learned or success stories, there is no need to include all of them from the Post Implementation Report. Include only the key ones here.

| **Project/ Phase** | **Key Lessons Learned and Success Stories** |
| --- | --- |
|  |  |
| Project 1 |  |
|  |  |
|  |  |

# Key Constraints and/or Risks

Update this section through the life of the program as risks close and new one open, and as constraints change.

Add text here.

When complete, delete all the blue instructions – here and in the document.

Instructions:

* This report should be completed as soon as the project plan has been accepted by the Project Sponsor
* The director of the agency will receive official notice from Legislative Council when this report is scheduled to be delivered to the Legislative IT Committee (LITC). Project Oversight, however, will also send an email to the Project Sponsor and Project Manager when Oversight notifies the Legislative Council that the report is ready for review. Please note that during some quarters startup reports are distributed and no presentations are required. Other times some or all of the reports need to be presented.
* The agency determines who from that agency will deliver the presentation to the LITC
* At the time the presentation of this report is delivered to the LITC, the agency should come prepared with twenty-five, three-hole punched copies of the report for distribution at the meeting
* If you have any further questions about writing or delivering this report, please contact your assigned Project Oversight Analyst
* Include the month, day and year the report was submitted to your assigned Project Oversight Analyst