

Executive

Sponsor

Reporting

Major Projects

Department of Technology & Information



Standards

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Pam Waters
Change Management Team Leader
Nancy Erwin
Change Management Communications Specialist
Department of Technology & Information
801 Silver Lake Boulevard
Dover, Delaware 19904
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Executive Reports for Major Projects

Objective:

Develop standard templates and reports for executive reporting for Major Project Stakeholders. Additionally, each report should have a description of its intended use, frequency and audience. This document is a guide to fulfill the communication needs of any major project and will be revised and updated as communication needs are identified. A few of the benefits for utilizing these standard reporting formats include:

- **Consistency** – many times the same person may sit on different Executive Committees. Viewing the same report formats for each different committee makes disseminating information easier and more efficient.
- **Efficient Identification of Critical Issues** - color coding status and risk assists in promptly identifying vital issues.
- **Simplification** - committee members become familiar with standard formats resulting in more productive use of time.

Definition:

Our definition of a major project is “a project that crosses organizational boundaries or significantly changes the way business is conducted in an organization”. While the majority of major projects involve the implementation of new technology, there is also involvement with projects where current business processes are being reengineered or optimized in *preparation* for new technology.

Summary:

The standard reports for any major project are identified in this document. These reports include topics that will be accompanied by appropriate documentation. The Appendices contain the report templates, instructions and samples.

Information from these reports will eventually lead to a comprehensive post implementation review and/or an Executive Stakeholder/Business Owner Summary Report.

Major Projects Executive Sponsor Meeting Agenda

These particular agenda elements were chosen because they consistently encompass all the critical topics needing discussion Executive Sponsor level meetings.

A. Intended Use

- a. The agenda template will be used for regular Executive Sponsor meetings
- b. Standard handouts
 - i. Major Project Status Overview
 - ii. Project Status Gantt Chart
 - iii. Major Project Readiness Report
 - iv. Budget Projection Report
- c. Standard agenda elements
 - i. Project overview
 - ii. Approvals
 - iii. Issues
 - iv. Significant accomplishments
 - v. Upcoming events

B. Frequency

- a. Monthly in the beginning of the project
- b. Weekly towards the completion of the project
- c. Depending on risks, issues etc., frequency could change

C. Audience

- a. Executive Sponsors
- b. Business Owners

Major Projects Executive Sponsor Agenda Template



Major Projects Executive Sponsor Meeting

Date

A G E N D A

PROJECT OVERVIEW

- Status
 - Project Overview
 - Gantt Chart
 - Readiness Statistics
- Budget
 - Project Budget Projection

APPROVALS

- Project Topic
 - Activity/Task
 - Activity/Task
 - Activity/Task
- Project Topic
- Project Topic
- Project Topic

ISSUES

- Issue One
- Issue Two
- Issue Three, etc.

SIGNIFICANT ACCOMPLISHMENTS

- Accomplishment One
- Accomplishment Two, etc.

UPCOMING EVENTS

- Event One
- Event Two, etc.

Major Projects Executive Sponsor Agenda **S A M P L E**



ERP Executive Sponsor Meeting

Date

A G E N D A

PROJECT OVERVIEW

- Status
 - Project Overview
 - Gantt Chart
 - Readiness Statistics
- Budget
 - Project Budget Projection
- Time & Labor
- Oracle vs. PeopleSoft
 - Oracle announced on Friday, August 8, 2003 that it was extending to mid-September its deadline for tendering shares in its hostile bid for PeopleSoft.
- Recruitment

APPROVALS

- Time and Labor April 1, 2004 Go-live date for:
 - SPO
 - DTI

ISSUES

- Who owns Time and Labor?
- Internet/Intranet Access for Employee self-service (eApplications)
- Financials

SIGNIFICANT ACCOMPLISHMENTS

- System Acceptance Testing – 8/4/03

UPCOMING EVENTS

- August 26 demo of Time and Labor

Major Project Status Overview

A. Intended Use

- a. This report gives a high level overview of the status of major project milestones. This report provides an opportunity to share the progress made so far and to validate that everything is in good shape to continue. Based on this report the project is ready to proceed to the next stage of work
- b. The project status is indicated by a red – yellow – green color scheme.
 - i. Sections include:
 - 1. Project status regarding timelines and budget.
 - 2. Organizational Readiness – comment on the customer’s readiness to proceed to the next stage
 - 3. Training – comment on the status of training development/deployment milestones (if applicable).
 - 4. Issues – Note the status of any outstanding issues and the resolutions agreed upon
 - ii. This report should be provided to the Project Director from the Project Manager/Leader

B. Frequency

- a. Monthly in the beginning of the project
- b. Weekly towards the completion of the project
- c. Depending on risks, issues etc., frequency could change

C. Audience

- a. Executive Sponsors
- b. Business Owner
- c. Executive Directors



Major Project Status Overview Template

Project Name	Risk	Comments
On time		
• Sub - project		
• Sub - project		
• Sub - project		
Under Budget		
• Sub - project		
• Sub - project		
• Sub - project		
Readiness		
Training		

Previous Issue's Status	Risk	Comments

Risk Color Key	
On Target – no risk	
In Progress – may complete late	
At Risk – needs attention	



Major Project Status Overview—S A M P L E

PHRST ERP Project Implementations Status Overview

PHRST Upgrade	Risk	Comments
On time		
Under Budget		
<ul style="list-style-type: none"> eBenefits 		
<ul style="list-style-type: none"> Recruitment 		
<ul style="list-style-type: none"> eRecruitment 		
Readiness		
Training		

Time & Labor	Risk	Comments
On-time		
Under Budget		
Training		
Readiness		

Risk Color Key	
On Target – no risk	
In Progress – may complete late	
At Risk – needs attention	

Previous Issue's Status	Risk	Comments
Internet/Intranet access for self service eApps		Employees will use internet for Open Enrollment
Financials		
Time & Labor Ownership		
Reporting Strategy Task Force		

Risk Color Key	
On Target – no risk	
In Progress – may complete late	
At Risk – needs attention	

Major Projects Readiness Status Report

A. Intended Use

- a. This report lists critical readiness tasks and the status of each organization/department as to completion. The status is indicated by a red – yellow – green color scheme.
- b. This report should be provided to the Project Director from the Project Manager/Leader

B. Frequency

- a. Monthly in the beginning of the project
- b. Weekly towards the completion of the project
- c. Depending on risks, issues etc., frequency could change

C. Audience

- a. Executive Sponsors
- b. Business Owners
- c. Executive Directors



Readiness Status Report – S A M P L E

Activity/Task & Categories	Target Start Date	Target Due Date	Org. Name														
Monthly Checklists																	
September	9/1/03	9/30/03	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
October	10/1/03	10/31/03	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
November	11/1/03	11/30/03	X			X			X							X	
Other Critical Tasks																	
Leave Survey	8/1/03	9/31/03	X	▲	X	X	▲	X	X	X	X	▲	X	X	▲	X	
Recruitment Survey	9/1/03	10/31/03		▲					▲		▲		▲				



Organization has completed as required



Organization is in process of completing task but will not finish by due date. No risk to readiness



Organization has not started this task and is jeopardizing readiness for this target. No risk to readiness.

Major Project Gantt Chart

A. Intended Use

- a. This chart gives a more detailed view of the status of major project milestones. It indicates the percent complete as well as the task duration and actual duration. The task status is indicated by a red – yellow – green color scheme with the percent complete.
- b. This report should be provided to the Project Director from the Project Manager/Leader

B. Frequency

- a. Monthly in the beginning of the project
- b. Weekly towards the completion of the project
- c. Depending on risks, issues etc., frequency could change

C. Audience

- a. Executive Sponsors
- b. Business Owner
- c. Executive Directors

Project Budget Projection Report

A. Intended Use

- a. This report gives a financial picture of the project. It indicates where/how the expenditures are being utilized as well as future expenditures. This report should be provided to the Executive Sponsors by the Project Director.

B. Frequency

- a. Monthly in the beginning of the project
- b. Weekly towards the completion of the project
- c. Depending on risks, issues etc., frequency could change

C. Audience

- a. Executive Sponsors
- b. Business Owners
- c. Executive Directors

Major Project Budget Projection Template (graphic)



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1																	
2			Total	Balance	Mon/Yr	YTD TOTALS											
3	Project Name		\$0	\$0													
4																	
5	Professional Services																
6					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
7					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
8					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
10																	
11	Infrastructure																
12					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
13					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
14					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
15					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
16																	
17	Software																
18					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
19					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
20					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22																	
23	Training																
24					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
25					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
26					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
27					\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
28																	
29																	
30																	
31																	
32	Project Totals:				\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Total Budget →

\$0

Balance Remaining →

\$0



Major Project Budget Projects – S A M P L E (graphic)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1																				
2			Total	Balance	Apr'03	May'03	Jun'03	Jul'03	Aug '03	Sep '03	Oct '03	Nov'03	Dec'03	Jan'04	Feb'04	Mar'04	Apr'04	May'04	Jun'04	YTD Total
3	Project Name		2,000,000	829,030																0
4																				0
5	Professional Services																			0
6		Contractor			1,500	1,500	1,500	1,500	1,500											7,500
7		Contractor			5,600	5,600	5,600	5,600	5,600	5,600	5,600	5,600	5,600	5,600	5,600	5,600	5,600	5,600	5,600	84,000
8		Contractor												26,000	26,000	26,000	26,000	26,000	26,000	156,000
9		Contractor									18,000	18,000	18,000	18,000	18,000	18,000	18,000	18,000	18,000	162,000
10		Contractor									22,000	22,000	22,000	22,000	22,000	22,000	22,000	22,000	22,000	198,000
11																				0
12																				0
13																				0
14																				0
15																				0
16	Infrastructure																			0
17		Hardware												400,000						400,000
18		PCs					12,000													12,000
19		Additional Office Space								4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	4,000	36,000
20									1,720											1,720
21																				0
22	Software																			0
23		Licenses																		0
24																				0
25	Training																			0
26		15 Trainees							63,750											63,750
27		Travel costs (Training)							50,000											50,000
28	Project Totals				7,100	7,100	7,100	19,100	122,570	5,600	49,600	49,600	49,600	****	75,600	75,600	75,600	75,600	75,600	1,170,970

Total Budget \$0

Balance Remaining \$0

Major Projects Executive Sponsor Issue Paper

A. Intended Use

- a. The issue paper template will be used to give details of issues needing Executive Sponsor/Stakeholder/Project Director resolution.

B. Frequency

- a. Depends on the Priority of the issue
 - A. Critical – Project is on hold until resolved and/or significant financial ramifications present. Needs resolution immediately.
 - B. High – Critical task timelines are in jeopardy and/or significant financial ramifications present. Needs resolution within one month.
 - C. Medium – Project timelines not in jeopardy at this time. No financial ramifications. Needs resolution within one to three months.
 - D. Low – Project timelines not in jeopardy, no financial ramifications. Needs resolution within 6 months or more.
 - E. Monthly in the beginning of the project
- b. Depending on risks, issues etc., frequency is subject to change

C. Audience

- a. Executive Sponsors
- b. Business Owners
- c. Project Director



Major Project Issue Paper Template

Major Project Issue Paper	
<i>Project Name:</i>	
<i>Initiated By:</i>	<i>Status:</i> <i>Priority:</i>
<i>Assigned To:</i>	<i>Resolved By:</i>
	<i>Date Resolved:</i>
<i>Functional/Technical Area:</i>	
<i>Issue Statement:</i>	
<i>Current Policy and Procedure:</i>	
<i>Alternate Solution(s):</i>	
1. <i>Statement:</i>	
<i>Pros:</i>	
<i>Cons:</i>	
2. <i>Statement:</i>	
<i>Pros:</i>	
<i>Cons:</i>	
<i>Proposed Solution</i>	
<i>Recommendation:</i>	

NOTE: Status selections:

Open
Closed

Priority Selections:

Critical
High
Low



Major Project Issue Paper Template – S A M P L E

Major Project Issue Paper	
<i>Project Name:</i> PHRST Upgrade	
<i>Initiated By:</i> Christine daCosta	<i>Status:</i> Closed <i>Priority:</i> Medium
<i>Assigned To:</i> Christine daCosta	<i>Resolved By:</i> Ruby Katcher
	<i>Date Resolved:</i> 10/3/2003
<i>Functional/Technical Area:</i> Payroll Functional Area	
<i>Issue Statement:</i> Request to have the emplid as default key on search records to payroll pages. Users would like to have the search record default to the emplid rather than company when opening payroll pages.	
<i>Current Policy and Procedure:</i> Currently users must tab or click on the emplid field. The current default is company. This is an item that one of our users asked about in 7.51 and was told maybe in the next upgrade prior to the state realizing the importance of minimizing modifications.	
<i>Alternate Solution(s):</i>	
1. <i>Statement:</i> Leave the default field as is.	
<i>Pros:</i>	
<ul style="list-style-type: none"> • No modification required • Currently how users enter the search criteria • Currently covered in training 	
<i>Cons:</i>	
<ul style="list-style-type: none"> • An extra stroke is required to move the mouse and click on the emplid field 	
2. <i>Statement:</i> Make a modification to change the default field to emplid.	

Pros:

- Minimal modification to the search record
- Enhanced customer satisfaction for the end user

Cons:

- May be impact on other views of records that may use this same search record in other areas
- Modification to the vanilla delivery

Proposed Solution: In staying with the French Vanilla initiative it is recommended to pursue *Alternative #1*. Wanted to bring this to the attention of the ERP Executive Sponsors even though the modification would be small because of the positive response from end users, that would be realized if the modification was realized.

Recommendation: Alternative #1 – Leave the default field as delivered

NOTE: Status selections:

Open
Closed

Priority Selections:

Critical
High
Low