Monitoring Report

Template



Version 2.0, September 2021

# Using This Template

To create a deliverable from this template:

* Delete the template title page (previous page) and this page.
* Replace [bracketed text] on the cover page (next page) with your project and agency information and add to document properties.
* Replace [bracketed text] in the tool header at the top of page 1 with the same project and agency information as on the cover page and add to document properties.

Note: Please do not remove or modify content in the footer area.

Complete the entire template. Each section contains abbreviated instructions, shown in italics, and tables for entering content. Relevant text from other project deliverables may be pasted into content areas.

Note: Please do not remove the italicized instructions.

# Monitoring Report

## [Agency/Organization Name]

## [Project Name]

Reporting Period: [Enter Start date as MM/DD/YY] To [Enter End date as MM/DD/YY]

|  |  |
| --- | --- |
| Version: [Enter Version Number] | Revision Date: [Enter MM/DD/YY] |

Approval of the Monitoring Report indicates an understanding and acceptance of the project information included within this deliverable. The agency representative submitting this deliverable agrees the project information is accurate, complete, and ready to be forwarded to the Quality Assurance Team (QAT) Texas Government Code Chapter 2054.307 does not require a formal approval signature for the Monitoring Report. However, agencies may choose to add their own internal signature requirements below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Approver Name** | **Title**  | **Signature** | **Date mm/dd/yy** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# Section 1. General Information and Dashboard

## General Project Information

| Project Title |
| --- |
|  |
| Reporting Period Start (mm/dd/yy) |
|  |
| Reporting Period End (mm/dd/yy) |
|  |
| Monitoring Report Frequency |
|  |
| **Project Phase**  |
| [ ]  Initiate [ ]  Plan [ ]  Execute [ ]  Close [ ]  Final Report  |

| Agency Head | Phone | Email |
| --- | --- | --- |
|  |  |  |
| **Information Security Officer** | **Phone** | **Email** |
|  |  |  |
| **SPAR Coordinator/ Contact** | **Phone** | **Email** |
|  |  |  |
| **Project Manager** | **Phone** | **Email** |
|  |  |  |

### Reporting and Compliance

|  |  |
| --- | --- |
| Project/Product Methodology | [ ]  Agile/Iterative [ ]  Waterfall [ ]  Hybrid [ ]  Other (Describe below) [ ]  Shift in project methodology since last report  |
| Project/Product Type | [ ]  Custom Development [ ]  Legacy Migration [ ]  Software as a Service (SaaS) [ ]  Commercial off the Shelf  |
| Funding Type/Source | [ ]  General Revenue [ ]  GR – D General Revenue Dedicated [ ]  Federal Funding [ ]  Other Funding (describe)  |
| IV&V vendor active? |  |

## 1.2 Public Dashboard The following required dashboard metrics will be published to a public dashboard, TX Gov Code 2054.159.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Performance Indicators | Formula(SPAR Calculates Schedule & Budget Metrics) | Result | Dashboard(Red, Yellow, Green) | Explanation or mitigation to be published with dashboard results (Optional) |
| ScheduleGreen >= .90Yellow >= .80 & <.90Red <.80 | SPI = Earned Value / Planned Value(expected result = round to the nearest 100th, e.g. 0.95)\*SPI Agile see below. |  |  |  |
| BudgetGreen >= .90Yellow >= .80 & <.90Red <.80 | CPI = Earned Value / Project Cost to date Total (expected result = round to the nearest 100th, e.g. 0.95)\*CPI Agile see below. |  |  |  |
| ScopeGreen <= 10%Yellow >10% & <= 20%Red >20% | Look at all scope related change requests in past 12 months. Scope Metric = cumulative $ amount of scope changes / $  *last approved total project cost* (expected result = percent change) |  |  |  |
| Quality | Depending on project phase, and according to the approved agency’s Quality Register, Quality Management Plan, or Quality Assurance Surveillance Plan enter results. |  |  |  |
| Optional Explanation of why initial budget/schedule is different from current budget/schedule. |
|  |

\* QAT recognizes the following two approaches for Agile SPI/CPI:

SPI = Completed Story Points / Planned Story Points, *OR*

SPI = (Actual Story Points/Sprint(s)) / (Estimated Story Points/Sprint(s))

CPI = Completed Features Value (to date) / Actual Costs to Date, *OR*

CPI = (Estimated Hours/Story Point) / (Actual Hours/Story Point)

If your agency uses a different formula for agile SPI/CPI, please document the approach in the Statewide Project Automated Reporting (SPAR) system.

# Section 2. Project Cost, Schedule, and Accomplishments

## 2.1 Cost

|  |  |
| --- | --- |
| Project Item | Report to Date  |
| Initial Estimated Project Cost  | Total: $  | Optional:Informational Cost: $Capital cost: $ |
| Last Reported Estimated Project Cost (Total) | Total: $ | Optional:Informational Cost: $Capital Cost: $ |
| Current Estimated Project Cost | Total: $ | Optional:Informational Cost: $Capital Cost: $ |
| Explanation of Variance between Last Reported and Current Project Cost |  |
| Project Cost to Date (Fiscal) | Total: $ | Optional:Informational Costs (optional): $Capital Costs (optional): $ |
| Project Cost to Date (Total) | Total: $ | Optional:Informational Costs: $Capital Costs: $ |
| Description of Cost Tracking Mechanism |  |
| Vendor(s) including solution, IV&V, QA, etc. – Name, Description of responsibilities, contract amount  |  |

## 2.2 Project Schedule

|  |  |  |  |
| --- | --- | --- | --- |
| Project Item | Start Date (mm/dd/yy) | Finish Date (mm/dd/yy) | Re-Baseline Date (mm/dd/yy) |
| Initial Planned  |  |  | (Intentionally left blank) |
| Last Reported  |  |  |  |
| Current Estimated  |  |  |  |

|  |  |
| --- | --- |
| If Current Estimated Project Start or Finish Dates have changed, explain the variance |  |
| Estimated Percentage of Project Complete \*Agile: Percentage of Finished Features |  |
| Description of Method Used to Track Progress |  |
| Description of Reporting Mechanism Used to Ensure that Project Participants and Management are Aware of the Project’s Progress |  |

## 2.3 Accomplishments

|  |  |
| --- | --- |
| Project Item | Report to Date |
| Accomplishments Achieved During this Reporting Period |  |
| Accomplishments Planned for Next Reporting Period  |  |

# Section 3. Milestones

Provide any background information that may be needed to clarify the milestone information provided in this section. List the project’s major milestones, and the planned and actual start and finish dates (mm/dd/yy). Specifically include deliverables/sprint completion in relation to the milestones as identified in the Project Plan. Identify the percent complete for each deliverable.

|  |
| --- |
| Milestones: Background Information |
|  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Project Milestones | Planned Start Date mm/dd/yy | Actual Start Date mm/dd/yy | Planned Finish Date mm/dd/yy | Actual Finish Date mm/dd/yy | Percentage Complete |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

# Section 4. Project Issues

Provide any background information that may be needed to clarify the project issues identified in this section. Identify major issues that are currently being addressed during this reporting period. Describe actions for managing each issue.

|  |
| --- |
| Project Issues: Background Information |
|  |

|  |  |
| --- | --- |
| Issue Description | Actions for Managing the Issue |
|  |  |
|  |  |
|  |  |

# Section 5. Risks

Provide any background information that may be needed to clarify the project risk information provided in this section. List the current highest risk factors for the project and any actions taken to mitigate the risk.

|  |
| --- |
| Risks: Background Information |
|  |

|  |  |
| --- | --- |
| Risk Factor | Mitigation |
|  |  |
|  |  |
|  |  |

# Section 6. Project Changes

Provide any background information that may be needed to clarify the project change information provided in this section. Describe major project changes (e.g., scope, budget, system requirements, technology) that occurred during this reporting period. Describe actions for managing the project changes.

|  |
| --- |
| Project Changes: Background Information |
|  |

|  |  |  |
| --- | --- | --- |
| Impact (check all that apply) | Change Description | Actions for Managing the Change |
| [ ]  Budget [ ]  Schedule [ ]  Quality [ ]  Scope [ ]  Resource [ ]  Software [ ]  Hardware [ ]  Technical  |  |  |
| [ ]  Budget [ ]  Schedule [ ]  Quality [ ]  Scope [ ]  Resource [ ]  Software [ ]  Hardware [ ]  Technical |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |