Approval Guidelines and Worksheet for Status Reports

The job aid is designed for managers who have been asked to a Status Report. It assumes that the Status Report has been written using the QNPM template and offers questions to consider for each section in the table below.

Section	Questions and Considerations	Your Notes
Achievements this period This section lists work completed this period and other notable accomplishments	• Are the same accomplishments listed in the last report? • If so, ask the team to provide information on what they have achieved specifically in this period	
Decisions this period This section lists all significant decisions made this reporting period. These decisions can be made by the Project Sponsor, Steering Committee, or Project Manager.	• Are any key decisions that you know of missing? • Do any decisions appear to be inaccurately recorded or misunderstood by the team? • If no decisions have been made, is this a problem? Is the team waiting for any key decisions?	
Priorities next period This section lists high priority items for the next reporting period. This list may include: • Deliverables that will be finished next period • Activities that will start or finish next period • Required decisions, including approvals, next period	• Does the team appear to have clear priorities? • Do the priorities listed look like the right priorities? • Are any priority activities, decisions, or deliverables missing? • Is it clear who is responsible for each priority? • Are any actions required by you next period to help the team achieve its priorities?	

Progress of deliverables
 	
This section provides a table of deliverables with progress information.
	• Have any dates in the "Planned Finish" column changed since the last period?
	   – Note: It is not accepted practice to change the "Planned Finish Date" for a late deliverable. The purpose of listing planned finish dates and actual finish dates separately is to detect variances, and planned finish dates should only change if the schedule has changed with permission of the Project Sponsor.
	   – If any planned dates have moved out, ask why and under whose authority. Information on changes should be provided in the section of the report on Change Requests
	• The "Actual Finish Date" column should be empty until the deliverable is complete
	• When comparing the "Planned Finish
	• List from Plan	

Section	Questions and Considerations	Your Notes
Project Issues This section lists all active project issues and provides recommended actions. Issues are things that are happening right now that need to be resolved in order for the project to proceed successfully. Note that not all project issues are listed here: issues that are resolved are stored in a separate Issue Log.	• Are the same issues listed in the last report? If so, ask why the issue has not been resolved. • Ask if actions being taken to resolve the issue are being done in a timely manner and if actions take are effective in resolving the issue • Ask what you can do to help resolve the issue	
Project Risks This section lists all active project risks and provides recommended actions. Risks are things that may or may not happen in the future that may have an impact on the success of the project. Note that not all project risks are listed here: risks that are closed are stored in a Risk Log.	• Are the same risks listed in the last report? If so, ask about the status of risk management activities and whether or not these activities are successful in mitigating the risk. • Ask what you can do to help mitigate the risk	
Change Requests This section lists all new and unresolved change requests. Change requests are requests to change an aspect of the project – usually scope, deliverables, the schedule, or the budget.	• Review changes proposed, accepted, or denied this period	

Budget
 	
This section provides information on whether or not the project is on budget.
	• A project can have five different positions:
	  1. Ahead of schedule, under budget
	  2. Ahead of schedule, over budget
	  3. Behind schedule, over budget
	  4. Behind schedule, under budget
	  5. On schedule, on budget
	
	The worst case scenario is if the project is behind schedule (work is not getting completed on time) and the project is over budget (the budget for completing work is being depleted faster than expected).
	
	If the project is behind schedule, you should expect it to also be underbudget; if the project is ahead of schedule, you should expect it to have used up the budget more quickly than expected.	