GENERAL COMMUNICATION, INC. PROJECT MANAGEMENT OFFICE (PMO)

REPORTING FOR RESULTS PROJECT

By

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A Project Submitted in Partial Fulfillment of the Requirements

for the Degree of

MASTER OF SCIENCE

in

Project Management

University of Alaska Anchorage

December 2016

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Abstract

General Communication Incorporated (GCI) is a project-driven company. As the PMO is established there is a need to document current reporting practices and improve the organizations project management maturity level by standardizing the reporting process and methodology, and determining the foundation to practice continuous improvement within the program management group. Research is needed to document an effective reporting system and implement improvements to the current reporting system with input from GCI team members. The goal of this project is to develop an effective reporting guide that documents current reporting templates and practices, and considers best practices and project management maturity for areas of improvements and more effective reporting.

Key words: projects, best practices, project maturity, effective project reporting, reporting practices, reporting for results

Introduction

Background

General Communication Incorporated (GCI) is a project-driven company. As the PMO is established there is a need to document current reporting practices and improve the organization's project management maturity level by standardizing the reporting process and methodology, and establishing the foundation to practice continuous improvement within the project management group.

Project Purpose

This project will consider reporting best practices, and attempt to identify gaps in the current GCI project reporting process. A set of nine project management best practices (see Exhibit 1) and a five level project management maturity model (see Exhibit 2) will be used to provide the structure for this report and to create an effective reporting guide for the GCI PMO.

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Best Practices
- Scope and objectives are clearly defined in the planning stage of a project.
- Deliverables are defined, reviewed and agreed to by key stakeholders and project sponsor.
- Project implementation is tracked and progress, status and forecast reporting is provided.
- Project planning for resources and budget is clearly based on scope, objectives and deliverables.
- Effective communication takes place within the team.
- Risks, or future events that can adversely impact a successful outcome to the project, are monitored and potential responses considered.
- Lessons learned discussions occur in project closing phase for continuous best practice improvement.
- Project Reporting is discussed prior to implementation and pre-established 'acceptable ranges' are agreed to for the difference between on--target and late/over--budget projects. Example: Project is on target if it is within +/- 10%.
- Change management is practiced to avoid scope creep. Scope changes are proposed, reviewed and accepted and then shared with the team
Sources: Kerzner, Wysocki, PMBOK, Klakegg, Williams, Walker and internal organization practices

Exhibit 1 List of Compiled Best Practices

Project Maturity Level
1. Basic project management processes and language is used.
2. There are individual project planning and common processes.
3. There is singular methodology by all for project planning and control.
4. There is process improvement and benchmarking discussed and considered.
5. Continuous best practices process improvement is practiced.

Source: Project Maturity Level based on concepts from Nicholas & Steyn (2008)

Exhibit 2 Project Maturity Level Model

The concept of project management maturity is based on an organization, through continuous improvement, evolving upwards on the five levels of maturity model as common language, methodology and processes are used. Research is needed to understand what an effective reporting system looks like and to develop one that fits GCIs culture.

Additional research is needed to receive data from internal GCI team members on suggested improvements to the current reporting system. Continuous learning best practices are found while holding a lessons learned meeting at the end of each project. The research completed in this project in effect asked GCI capital project stakeholders to rate project reporting in general, on all projects they have been involved in.

This project will develop a reporting guide that documents current reporting templates and practices, and considers best practices and project management maturity for areas of improvement for effective project reporting. For organization project management maturity to evolve standardized reporting and a foundation to practice continuous improvement is needed. This project will significantly contribute to project management body of knowledge. The output deliverables will be a project reporting guide, report templates and a proposed training class syllabus.

Project Scope Statement

The scope of this project includes documenting current GCI reporting processes and templates and external research to better understand continuous improvement, best practices and organizational project management maturity. The information gathered through research, personal experience and what has been learned through the University of Alaska project management graduate program will all be applied to the final products of the project.

Project Goals and Objectives

- To increase this PM's knowledge of effective project reporting
- To document an effective reporting system that includes current GCI best practices
- To show, through research, the next steps needed at GCI to increase Project Management Maturity Level
- To create a project reporting guide and reporting templates for the GCI PMO
- To establish a GCI PMO SharePoint site and Project Reporting Lessons Learned files for continuous learning

Literature Review

The literature review was conducted to provide background information on project reporting fundamentals, tools and theory. The literature selected for review was chosen based on its merits and the credibility of the author and publishers. Topics of interest included continuous learning, best practices, project maturity level, establishing a reporting system and understanding project reporting challenges. The goal was to establish and document what information is needed for an effective reporting system.

The Reporting System

- Find Reporting Equilibrium
- Understand Project Basics and the Triple Constraint
- Establish Baseline Measurements in the Initiating & Planning Phases
- Verify Scope, Schedule and Budget in Execution Phase
- Perform Periodic Variance Analysis of Actual to Baseline
- Provide Effective Regular/Consistent Reporting
- Share Communication Plan with Team
- Develop and Implement a Get-Well Plan
- Practice Continuous Learning

Finding Reporting Equilibrium

The project manager must find the correct reporting equilibrium because without reporting expectation from the team the project will likely not get the attention needed to keep it on schedule and yet too much reporting can prevent team members from focusing on the tasks that will move the project closer to it finished product (Wysocki, 2009).

Understanding Project Basics and the Triple Constraint

The Project Management Institute (PMI) defines a project as 'a temporary endeavor to produce a unique product, service or result (PMBOK 2008).' Another way to define a project is to say it is a set of tasks or activities that are completed either sequentially or concurrently with schedule, money and resource constraints to meet a unique goal and typically brings about beneficial change or added value to the company. A project will have:

- Unique deliverables with performance specifications (scope, quality);
- A start and end date (schedule);
- Resource and material needs (costs); and
- Uncertainty (risk).

Project management is the application of knowledge, skills, tools and techniques to project activities to complete the project requirements (deliverables) to produce a final product and guide the project through the five Project Management Institute (PMI) process groups of Initiating, Planning, Executing, Monitor and Controlling and Closing.

The triple constraint relationship between scope, schedule, and budget is an important concept for effective project management and reporting because a change to one side of the triple constraint triangle will always impact the other two sides. The project manager must always consider and communicate the impact of changes, slips or delays in relation to the triple constraint.

Establish Baseline Measurements in the Initiating & Planning Phases

Baseline scope, schedule and budget, risk and quality measurements are established in the Initiating and Planning stage of the project and should be reviewed, discussed, and accepted by both the sponsor and team. The measurements will be used to gauge project status and to identify project distress. It is good project management to understand early on when a project is in jeopardy of not meeting scope, schedule or budget commitments so that corrective action can be taken early enough in the project to impact the outcome or reverse/make up for the expected slip or delay. (Chatfield & Johnson, 2010).

Defining Scope for a baseline measurement is done before the budget and schedule is completed. As project planning occurs, scope is defined by agreeing to the project product and the set of deliverables needed to accomplish the desired product. These deliverables should be a verifiable product, result or capability to perform a service.

A milestone scheduled to track significant events is suggested for the baseline measurement. Although some projects require a very detailed schedule often a milestone schedule will suffice. A milestone schedule should be built on project deliverables with baseline dates assigned to keep the project on schedule. Tracking deliverable or task completion dates is an effective way to track actual work completed. It is very important for the project manager to decide what percentage of work is complete and when a deliverable is 100% done.

An Earned Value Management (EVM) S-Curve can be used for the budget baseline measurement. This method of tracking project budget that combines scope, schedule and resources to determine the value of the work completed. In the planning phase an assessment is made to show the timeline of when money is spent over the project – from beginning to end – so it can be compared to actual costs (PMBOK, 2008).

An initial risk assessment to consider possible future events is used to set the baseline measurement and to develop the risk plan of action to take if the risk does occur. The minimum assessment performed by the team should identify and prioritize potential risks, determine risk indicators or early warning signs, and determine what initial steps should be taken to address the risk identified. A team member should be assigned to monitor the risk and report to the team when the risk trigger occurs.

The quality of a project is maintained by monitoring and controlling the scope of the project, performing integrated change control, and controlling adherence to established schedule and budget. Quality baseline measurements include ways to verify the final product meets or exceeds committed or contractual requirements and technical specifications. Quality checks for each deliverable should be quantifiable and

measureable. Performance standards must be established in the planning phase so the team is aware of the final product goals. Examples of quality checks include both determine and implement industry standard or contractual testing requirements and develop and/or or use an existing checklist created from lessons learned on past projects of task requirements. Continuous learning.

Verify Scope, Schedule and Budget in Execution Phase

Project deliverables must be verified to confirm the agreed upon technical or desired specifications for the project product are met. Periodic inspection to monitor progress and quality on deliverables is performed during the execution of the project. Field reports, site visits and monitoring budget spend is needed. The project manager must be the one to determine the quality and percentage of work that has actually been completed. What equals done for an individual team member is always subjective and should be measured to the deliverable or product specifications.

- Scope verification is accomplished by confirming team will complete agreed upon deliverables and managing change requests through an integrated process that includes sponsor approval and an agreed upon impact to schedule and budget.
- An integrated change control process should be used for requested scope changes to avoid scope creep. This would include reporting on who requested the change, the evaluation process used to determine the validity of request, approval status of the change, and the impact to the project schedule and budget.
- Schedule verification is accomplished by comparing work complete to baseline milestones.
- Budget verification is accomplished by comparing work charged to the project to expected spend.
- Risk verification is accomplished by monitoring initial risk assessment and periodically considering new potential risks.
- Quality verification is accomplished by verifying scope, schedule and budget, confirming contractual specifications will be met, and using checklists developed in the planning phase.

Perform Periodic Variance Analysis of Actual to Baseline

Variance analysis is an after-the-fact look at what caused the difference between the baseline expectation and the actual performance (PMBOK 2008). Common steps to take for variance analysis:

- Verify the quality of the information collected to make sure it is accurate, complete and credible to your analysis;
- Determine the variance by comparing the actual dates or number of tasks, items, etc. completed as compared to baseline;
- Note both favorable and unfavorable issues; and
- Consider trends by week or month to determine if the issue is a one-time problem, has gone away or is increasing.

The project manager must provide the early warning alert when corrective action is needed. The variance analysis is an effective tool to determine factual information on project status. Once the variance is known the PM must analyze the new information, determine how it impacts the project, take corrective action where needed, and report to the team, stakeholders sponsors as appropriate.

Share Communication Plan with the Team

A Project Communication Plan consists of stakeholder analysis, field reporting needs, an information distribution plan, managing stakeholder expectations, and reporting on performance of the project. In short, this is where effective project reporting comes together and requires planning on the information needed from the team (field reports), thought on the reporting the PM will provide to the team and the sponsor, and how all of the information will be collected, formatted and delivered.

The stakeholder analysis and a communication matrix will determine the information to be provided to each group and how it will be distributed. Careful planning in this step will consider how to manage stakeholder expectations. The goal to get the pertinent information to the correct audience on a regular basis so confidence in the project is high.

Field report expectations need to be clearly defined for each team member. This includes what tasks she is responsible for, the format of the regular reporting, information to be reported, the frequency needed and the day(s) the report is needed.

A communication matrix can be used to organize the many reporting requirements and distribution interval. This is an example of a communication matrix:

Communication Type	Description	Frequency	Format	Participants/ Distribution	Deliverable	Owner
Weekly Report	Summary/ highlights	Weekly	Email	Team	Status, Progress	Project Manager
Field Report #1 Weekly Team - Circuits	Circuit migration progress	Weekly	E-mail or In Person	Circuit Team	Circuit migration status/issues, # of sites commissioned, billing questions, COGS/target list issues	Stephanie, George, Bryony, Nancy
Field Report #2 Weekly Team – MFA/OSP	OSP/MFA progress	Weekly	E-mail or In Person	MFA/OSP Team	Q forecast status, OSP term progress, install & commission issues, MFDB updates	Donna, Bruce, George
Field Report #3 Pre – Q Prep	Review targets for next quarter and scrub list	30 Days Prior to Q	E-mail or In Person	Team	Agreement on next Q target list, DDOA status, circuits, MFA inventory, risks,	Donna, Bruce, George, Stephanie
Post-Q Review	Review previous Q work	Within 30 days end of Q	E-mail and In Person	Team	Quarterly completions, variance analysis, run rate actual & forecast, lesson's learned	Donna, Bruce, George, Stephanie
Executive Report	Summary and forecast	TBD	E-mail and In Person	Sponsor, Managers	Scope, schedule, budget dashboard	Donna
Monthly Review	Metrics and forecast	Monthly If Needed	E-mail and In Person	Team	Q forecast, status/progress highlight report from key team members, lunch	Donna, Bruce, George, Stephanie

Exhibit 3 Communication Plan – Reporting Matrix Example

This is visual example of a communication plan for a project that includes information needed from the team, the deliverables to be reported on, and the reports the PM will generate and distribute to the team.

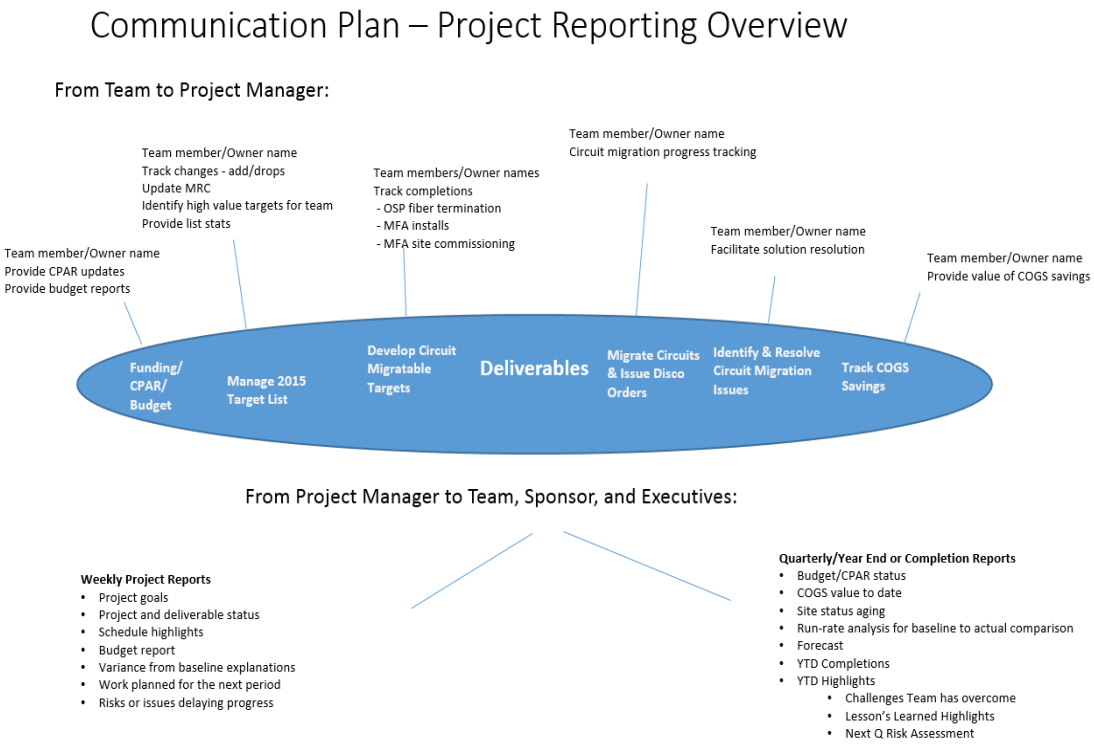

Exhibit 4 Communication Plan - Project Reporting Overview Example

Provide Effective Regular/Consistent Reporting

Effective project meetings occur on a set schedule and have a clear purpose and goal. Regular scheduled meetings allow the team to know there is a set time that all other team members will be available for project issues discussions. The project manager will track issues and commitments made in the meeting. Team members should feel their time is being used well.

A good project meeting agenda covers the following topics:

- Meeting purpose, goal and project deadline date
- Overall project status
- Updates by key team members on deliverable/task status
- Work planned for the next time period
- Current issues and concerns
- Potential future risks, ownership and mitigating action

- Goals for the team for the next meeting

A consistent weekly report template and reporting schedule should be used from week-to-week, month-to-month and project-to-project. Several templates can be found including ones in The One-Page Project Manager books (Campbell, 2008). Whichever template is used it should be kept to one page and should include the following sections for report information:

- Project name, tracking number, sponsor and date
- Project goal
- Overall status for scope, schedule and budget with stoplight indications (red, yellow green)
- Area to explain and variance from plan or current status
- Budget information
- Project overview for scope, deliverables and team
- Project goals for near future
- What is the way of making progress or future risks

Traffic light reporting is an excellent progress tracking method that is easily understood by team members and sponsors. Established parameters and colors can aid in stakeholders assessment of project status.

Green	Within +/- 10% on schedule and budget and meeting milestones. The project risks and issues have been identified and are under control. Likeliness and Impact of risk is minimal.
Yellow	=<10% Over/under budget or schedule. Overall things are under control but the project may contain a few high-impact risks and/or issues. Successful recovery plan is being executed and is expected to cure problem.
Red	>10% Over/under budget or schedule and/or a number of high-impact risks and/or issues are impacting performance. The project is behind schedule and a Get Well plan is needed.

Source: Kerzner

Exhibit 5 Stoplight Measuring System Example

Reporting percentage complete on each deliverable is an effective way to keep everyone honest on what is actually done. It is very important for the project manager to decide what percentage of work is complete and when a deliverable is 100% done.

Project report statements generally falls into four categories: status, progress, forecast and burn rate. Ad Hoc reports to focus specifically on one of these four can be requested but in general the weekly reports will contain a bit of all four. Things to consider for each type statement:

- Status – provides a snapshot view of what is happening to date;
- Progress – shows what has happened since the last report or a specific period of time;
- Forecast – an estimate of time and budget to finish the project; and
- Burn Rate – shows what has occurred in the past.

Effective reporting will motivate the team to take action. Project managers plan their project baseline and milestone dates with care so each can be used as an early warning for potential slips in schedule or budget. Good reporting will both motivate the team and manage expectations of the project by accurately calling out status and progress-to-date and a forecast – good or bad – of project completion based on performance to date. The team is best motivated by clear attainable challenges throughout the project.

Develop and Implement a Get-Well Plan

The Get-Well Plan pulls all of the project assessment and management tools together. It is important to not underestimate how difficult it is to get the team to agree a project is in trouble early on. Yet, corrective action taken early on is most effective so it is up to the project manager to find that equilibrium (Wysocki, 2009).

Complex projects and optimism that all will come clear in time can make it difficult to pinpoint project distress. Baseline measurements and checklist made in the planning phase of the project is extremely useful to begin discussions of project distress during the execution phase. Gauging reactions and reading body language is important as well and therefore sharing concerns with the team members at meetings or site visits is suggested.

Consider these common reasons for not identifying when a project is in distress (Klagegg, et all, 2010):

- Easy for team to be overly optimistic
- Not enough external input (groupthink)

- Too much trust placed in experience people
- Motivation bias – if we actually have a problem then we actually need to take corrective action
- Don't want to deal with conflict when another group/team member is behind
- Preference to blame others rather than focus on individuals work
- Corporate politics or power plays

Take corrective action when it is clear that a project is in trouble through variance analysis to baseline measurements and/or negative field reports it is important to put together a Get-Well-Plan that includes the corrective action needed to get the project back on track and calls out impact to schedule and budget (triple constraint)..

The project manager will develop the plan but then it should be discussed in person when possible with the sponsors and key team members so that assumptions can be explored and challenged before it is presented to the team. The plan should be clear, have key deliverables and milestones and where possible checklists of tasks and assigned resources. Talk with the resources to make sure they can meet requirements on requested schedule.

Practice Continuous Learning

The concept of organizational project management maturity is based continuous improvement and identifying and using best practices. Each GCI project manager should always be mindful of current PMO best practices and through lessons learned meetings identifying and sharing new found best practices with the PMO.

Research Methodology

Project research included a literature review and survey to collect data from stakeholders involved in the GCI capital project implementation process and project reporting. The intent of the literature review was to develop and document an effective project reporting system by reviewing the many books available on the topic. The intent of the survey was to collect data from current project stakeholders to assess their perception of current GCI organizational project management maturity level, and to gain insight into how project reporting could be more effective from the user's perspective.

Survey methodology, to ensure as much information as possible was gathered to assess the current project management reporting needs of the company – and to validate what was learned in the literature review – included a survey that was conducted to all groups known to actively participate in the GCI capital project process. This included sponsors, internal project customers, financial/capital analysts and managers, fellow project managers, and project team members. The survey was sent to 98 recipients with 29 responding for a 30% response rate. The survey consisted of 12 questions with the intent to understand the demographics of each participant, their current reporting habits, their perception of best practices used and the project maturity level at GCI, and closed and open-ended questions on what is needed to improve project reporting overall and on distressed projects.

An analytical procedure was used to analyze the data collected from the survey. This process includes seven steps as noted in the textbook Designing Qualitative Research (Marshal & Rossman, 2006). The collected data was organized in chart and statistical analysis format by the Survey Monkey Software. Open-ended question answers were downloaded to Excel, answers were categorized and put into project management language (ex: pm should provide more info on slippage cost to schedule and budget would be categorized to 'Forecasting') and then sorted by number of occurrences. At that point the researcher immersed herself in the data. Reading the data over and over, taking notes to log the data and tracking important information in notes. As the researcher became familiar with the data, she extrapolated the highest number of common answers and themes for both the closed and open-ended questions. Although all information was considered, only the top 3 responses from questions are reported on. Not all data was included in the survey analysis.

To ensure validity and reliability, the research design and methods of this project have been accurately detailed specifically focusing on how the data will be collected. Every effort has been made to ensure the information in this report accurately reflects the research and responses of the participants. Triangulation is the act of bringing more than one source of data to bear on a single point (Marshal & Rossman, 2006). For this report, triangulation is accomplished by detailing the research design and methods, documenting the survey responses, and finally by thoroughly reviewing project requirement notes when developing the following analysis and research conclusions.

Survey Data Analysis

Demographics. The data shows of the 29 GCI employee or contractor respondents 69% have 11+ years of project implementation experience and 66% are either project team members (11) or project managers

(8). Remaining respondents 31% are project sponsors (4), project customers (3) and involved in finance and capital management (3).

Report Reading Habits. 79% agree they read project reports on a regular basis. 55% prefer weekly reports emailed for their project updates and 24 % prefer weekly project updates at a status meeting.

Survey Results

The data consistently shows the need for improvements in current reporting, specifically in the following areas:

- The use of standardized reporting templates and reporting methods;
- The importance of communicating with the team;
- The need for forecasting work to be completed over next period and schedule and budget completion; and
- The need for process improvement.

The use of standardized reporting templates and reporting methods had the highest number comments from respondents. The GCI Network Services project managers already use a standardized template and report regularly on an every other week time period so two assumptions are made: 1) there is a need to have project managers company wide use the same template and report on a consistent time interval, 2) there is a need for the process/method to communicate information on the existing template to be standardized.

The importance of communicating with the team. Although this was not the highest selected request, the open-ended responses consistently asked for more communication with team, team involvement in project strategy, discussions with the team about project challenges and how to resolve problems, as well as a need for better problem root analysis, issue verification through periodic site visits and being able to explain to the team where the problem is in the big picture view of the project.

The need for forecasting work to be completed over next period and schedule and budget completion was called out many times in the data.

The need for process improvement. The need for better process was mentioned in relation to scope, schedule and budget tracking, communication with the team, project history tracking, better field reports, better management support and new software.

Research Conclusions and Gap Analysis

The literature review research provided the information needed to identify an effective reporting system which consists of the following steps:

- Find Reporting Equilibrium
- Understand Project Basics and the Triple Constraint
- Establish Baseline Measurements in the Initiating & Planning Phases
- Verify Scope, Schedule and Budget in Execution Phase
- Perform Periodic Variance Analysis of Actual to Baseline
- Provide Effective Regular/Consistent Reporting
- Share Communication Plan with Team
- Develop and Implement a Get-Well Plan
- Practice Continuous Learning

The survey response data provided the information needed to identify gaps in the current reporting system in comparison to the compiled list of best practices and project management maturity level model.

In the following two charts the answers provided by respondents to improve project reporting are shown in relation to project maturity and best practices.

In Exhibit number 6 answers to the following two questions are shown

Question 5 – Check all best practices that in your opinion commonly occur in project management in your company.
Question 11 - *List your top 3 suggestions for project managers to identifying and communicate when a project is in jeopardy of being late and/or over budget.*

Best Practices and Top Suggestions for Communicating on Distressed Projects	Q. 5	Q. 11
Top 3 Best Practices & *Communication Suggestion for Distressed Projects*		
- Scope and objectives are clearly defined in the planning stage of a project.	18	
- Deliverables are defined, reviewed and agreed to by key stakeholders and project sponsor.	16	
- Project implementation is tracked and progress, status and forecast reporting is provided.	14	
Provide Forecast on budget and schedule to complete project		10
Middle 3 Best Practices & *Communication Suggestion for Distressed Projects*		
- Project planning for resources and budget is clearly based on scope, objectives and deliverables.	12	
Understanding Resource Issues		4
- Effective communication takes place within the team.	11	
Communicate Plan More Effectively		8
More Team Involvement		4
- Risks, or future events that can adversely impact a successful outcome to the project, are monitored and potential responses considered.	10	
Bottom 3 Best Practices & *Communication Suggestion for Distressed Projects*		
- Lessons learned discussions occur in project closing phase for continuous best practice improvement.	6	
- Project reporting is discussed prior to implementation and pre--established 'acceptable ranges' are agreed to for the difference between on--target and late/over--budget projects. Example: Project is on target if it is within +/- 10%.	5	
- Change management is practiced to avoid scope creep. Scope changes are proposed, reviewed and accepted and then shared with the team.	5	

Sources: Kerzner, Wysocki, PMBOK, Klakegg, Williams, Walker and total respondent answers per questions.

Exhibit 7 Survey Results Overlay of List of Compiled Best Practices

In Exhibit number 7 answers to the following two questions are shown

Question 6 – Choose the level of project management maturity you feel your company is currently operating at:

Question 12 - *List your top 3 suggestions for improving project reporting in your company:*

Project Maturity Level and Top Suggestions for Improving Project Reporting	Q. 6	Q. 12
1. Basic project management processes and language is used.	10	
2. There are individual project planning and common processes.	21	
3. There is singular methodology by all for project planning and control.	2	
Use Standard Reporting Template and/or Methods		*16*
4. There is process improvement and benchmarking discussed and considered.	3	
Better Scope, Schedule, Budget Tracking		4
Better Communication and Team Involvement		4
Better History Tracking		3
Better Field Reports		3
Management Support		3
new software/hardware		3
5. Continuous best practices process improvement is practiced.	5	

Source: Project Maturity Level based on concepts from Nicholas & Steyn (2008)

Exhibit 7 Survey Results Overlay of Project Maturity Level Model

Summary of Project Products

To support the project requirements as described in this research the following project products were developed:

1. Standardized Methodology
    - Project Reporting for Results Guide Document
    - Project Reporting Checklist

2. Standardized Templates
    - Project Report Template
    - Scope Change Order Tracker Example
    - Budget - Pull Oracle Commitments How to Guide
    - Budget Material and Labor Pivot Table View (from Oracle Commitment data)
    - Milestone schedule example
    - Risk Analysis Template
    - Quality Checklist
    - Communication Plan Example
    - Chart - Project Run Rate
    - Chart S-Curve Cumulative Cost Chart
    - EVM Pocket Guide
    - EVM Earned Analysis Report Template (FUTURE USE)

3. Knowledge-Sharing Process
    - GCI Project Management SharePoint Site – Project Reporting Lessons Learned

Standardized Methodology

Project Reporting for Results Guide – the research made it clear a document was needed to capture current GCI reporting templates and, to some extent, the process of reporting, and to then take it a step

further to introduce industry best practices. This document methodology is intended to provide GCI project managers with reporting fundamentals, suggestions on the type of information to report on and how to use existing GCI processes and templates. The methodology consists of current GCI templates and processes tools Initiate and Plan the project for effective management and accurate project reporting. The content is intended for experienced project manager with familiarity of PMI and PMBOK practices. The concepts and suggested processes can be applied to any project.

Project Reporting Checklist – this document captures the required topics and key considerations for effective project management reporting. It is intended that once the PM has reviewed the complete methodology for effective project reporting this checklist can be used to the start of each new project or phase as quality control measure.

Standardized Templates

Project Report Template – this one page status report template in Excel format is easily copied to a word document or power point format for presentations. This is a current version of the GCI template and although several sources were reviewed including The One-Page Project Manager books (Campbell, 2008) a superior report was not found that allowed for so much information to be captured on one-page.

- Project name, tracking number, sponsor and date
- Project goal
- Overall status for scope, schedule and budget with stoplight indications (red, yellow green)
- Area to explain and variance from plan or current status
- Budget information
- Project overview for scope, deliverables and team
- Project goals for near future
- What is the way of making progress or future risks

Scope Change Order Tracker Example – this one page tracker example in Excel format is one of many ways to track scope changes for a project. Columns can be added or changed as needed to fit project needs.

Budget - Pull Oracle Commitments How to Guide – This guide is provided by GCI IT Application Engineer Melanie Warnick and is a step-by-step guide to pull project financial information from Oracle. For the most accurate budget tracking this information should be pulled once a month on or about the 15th of each month. This is to have a consistent month-to-month spend and because GCI accruals for the next month are posted on or about the 10th of each month. This will produce a data dump of expenditures. See the 'Material and Labor Pivot Table View' section for formatting. The template version can be found in the 'Project Reporting for Results Template Workbook.'

Budget - Material and Labor Pivot Table View (from Oracle Commitment data) – this Excel pivot table view is intended to accompany the 'Pull Oracle Commitments How to Guide' to format the data. The template version can be found in the 'Project Reporting for Results Template Workbook.'

Milestone Schedule Example – this 10-task schedule example in Excel format is one way to track milestones for a project. Columns can be added or changed as needed to fit project needs.

Risk Analysis Template – this template is used to consider and prioritize possible future events. The minimum assessment performed by the team should identify and prioritize potential risks, determine risk indicators or early warning signs, and determine what initial steps should be taken to address the risk identified. A team member should be assigned to monitor the risk and report to the team when the risk occurs.

Quality Checklist(s) – an example of a quality checklist is provided. Quality baseline measurements include ways to verify the final product meets or exceeds committed and/or contractual requirements and technical specifications. A PM can search in the SharePoint site for checklists created in the lessons learned file on past projects.

Communication Plan Example – includes a stakeholder contact list, stakeholder power interest grid, a communication matrix to capture information distributed plan, and a visual example of a project communication plan.

Chart - Project Run Rate – the project run rate chart is in excel format and is an excellent way to view one measurement of the project: labor or material or budget. The format allows for a great deal of information to be captured in one view and shows monthly totals, cumulative totals and trend to meet

labor, material or budget spend for the project. The template version can be found in the 'Project Reporting for Results Template Workbook.'

Chart - S-Curve Cumulative Cost Chart (EVM) – The S-curve Excel chart is an excellent Earned Value Management (EVM) tool that captures cumulative planned work for the project in the planning stage and then allows for monthly annual costs to be added for a baseline comparison. Although GCI does not currently embrace EVM this chart even used in its simplest form is an excellent tool to plan and track budget spend. The template version can be found in the 'Project Reporting for Results Template Workbook.'

EVM Pocket Guide – this is a reference guide used by a government agency (DOE) and covers EVM basics including common terms and formulas.

EVM Earned Analysis Report Template (FUTURE USE) – this template is provided for future use as an example of EVM analysis reporting.

Knowledge-Sharing Process

The new GCI PMO SharePoint Site Structure is still under discussion. Once the file has been established a copy of the URL will be added to this document.

Recommendations for Future Work

The deliverables from this project has provided a standard format for GCI project managers to use for project reporting as well as provided suggested ways to improve the effectiveness of weekly project reporting. Future research to measure the success of these findings is recommended. A follow up survey in 6 months and one-year timeframe to the same group of respondents is suggested so that answers can be compare against the list of best practices and the project maturity level model.

References

A guide to the project management body of knowledge (PMBOK Guide). (2008). Newtown Square, PA: Project Management Institute.

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Project Management Office (PMO)

Project Reporting for Results Guide

This document can be found in the General Communication, Inc. (GCI) Project Management Office (PMO) library located at: to be provided once established. It is intended to be used by project managers at GCI to show the process and documents used for reporting. Once familiar with this guide the PM may choose to use it as a reference document as needed at each phase of the project or when starting new projects. The 'Project Reporting for Result' Excel File accompanies this guide. Additional project management tips, tools and robust lessons learned documentation can also be found at GCI PMO library.

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List of Exhibits

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Introduction

Overview of Document

General Communication Incorporated (GCI) is a project driven company. As the PMO is established, there is a need to document current reporting practices and improve the organization's project management maturity level by standardizing the reporting process and methodology, and building the foundation to practice continuous improvement within the project management group.

This Project Reporting for Results guide is intended to provide GCI project managers with reporting fundamentals, suggestions on the type of information to report on and how to use existing GCI processes and templates. The content is intended for an experienced project manager with a familiarity of the Project Management Institute (PMI) and Project Management Body of Knowledge (PMBOK) practices.

Through significant research, an effective reporting system has been developed, and the following structure will be used for this guide. It is ordered by PMI reporting phases where applicable:

- Reporting Basics
  - Find Reporting Equilibrium
  - Understand Project Basics and the Triple Constraint
  - Share Communication Plan with Team
  - Provide Effective Regular/Consistent Reporting
- Initiating & Planning Phases
  - Establish Baseline Measurements
- Execution and Monitor & Control Phases
  - Verify Scope, Schedule, and Budget
  - Perform Periodic Variance Analysis of Actual to Baseline
  - Execution, Monitor & Control Phase Reporting
  - When Needed Develop and Implement a Get-Well Plan
- Closing Phase
  - Practice Continuous Learning

It is acknowledged that the format and some material content used in this guide are from the PMBOK, published books and peer-reviewed articles, as well published University Alaska, Anchorage (UAA) capstone projects. The literature selected for review were all chosen based on its merits and the credibility of the author and publishers as well as their overall contribution to the project management body of knowledge. Topics of interest included continuous learning, best practices, project maturity level, establishing a reporting system and understanding project reporting challenges.

GCI Reporting Templates, Processes, and SharePoint File

The GCI weekly reporting template, instructions to pull an Oracle budget report, and additional suggested templates and charts are found in the 'Project Reporting for Result' Excel File that accompanies this guide. Each item will be referred to in the body of the guide with an appropriate appendix reference. Although it is expected that every GCI PM uses the same one-page reporting template provided, each department will decide the additional templates and charts suggested in this guide. Unless otherwise determined by the team, it is suggested that weekly meetings and project reporting are used.

PMI, PMBOK and Project Knowledge Areas, and Phases

The PMBOK book contains a set of standard terminology and guidelines used for Project Management. The PMI oversees the PMBOK revisions as the body of knowledge on project management evolves. PMI also offers Project Management Professional (PMP) and Certified Associate in Project Management (CAPM) certification.

It is strongly suggested that each project manager has a PMBOK and refers to it throughout the lifecycle of every project. There are 42 project management processes within the five process groups of Initiating, Planning, Executing, Monitoring and Controlling and Closing. Reporting project performance is a communication process in the Monitoring and Controlling process group.

Reporting Basics

Effective project reporting starts with an understanding of what a project is, why project management is needed and why the triple constraint is a critical concept to understand. Information for reporting is dependent on consistent project meetings with agendas that encourage the exchange of information, allow for detailed field reports, and include proper notes that capture issue and history tracking.

Find Reporting Equilibrium

The project manager must find the correct reporting equilibrium because without reporting expectation from the team the project will likely not get the attention needed to keep it on schedule and yet too much reporting can prevent team members from focusing on the tasks that will move the project towards completion.

Understand Project Basics and the Triple Constraint

The PMI defines a project as 'a temporary endeavor to produce a unique product, service or result (PMBOK 2008).' Another way to define a project is to say it is a set of tasks or activities that are completed either sequentially or concurrently with schedule, money and resource constraints to meet a unique goal and typically brings about beneficial change or added value to the company. A project will have:

- Unique deliverables with performance specifications (scope, quality);
- A start and end date (schedule);
- Resource and material needs (costs); and
- Uncertainty (risk).

Project management is the application of knowledge, skills, tools and techniques to project activities to complete the project requirements (deliverables) to produce a final product and guide the project through the five PMI process groups of Initiating, Planning, Executing, Monitoring and Controlling, and Closing.

The triple constraint relationship between scope, schedule and budget is an important concept for effective project management and reporting because a change to one side of the triple constraint triangle will always impact the other two sides. The project manager must always consider and communicate the impact of changes, slips or delays in relation to the triple constraint.

Provide Effective Regular and Consistent Reporting

Regular and consistent reporting is accomplished when there is a good flow of information coming from the team. Project meetings should occur on a set schedule and have a clear purpose and goal. Regularly scheduled meetings allow the team to know there is a set time that all other team members will be available for project issues discussions. Team members should feel their time is being used well.

A good project meeting agenda covers the following topics:

- Meeting purpose, goal and project deadline dates;
- Overall project status;
- Updates by key team members on deliverable/task status (field reports);
- Work planned for the next time period;
- Current issues and concerns;
- Potential future risks, ownership and mitigating action; and
- Goals for the team for the next meeting.

Project notes that capture project issues, assigned tasks and project history should be updated before each meeting and shared with the team. See Appendix B for the project meeting notes template.

The information gathered from weekly meetings, field reports, and periodic site visits are consolidated into highlights on a weekly report template. The same template and reporting schedule should be used from week to week, month to month and project to project. See Appendix A for the current one-page GCI template.

Share your Communication Plan with the Team

A Project Communication Plan consists of stakeholder analysis, field reporting needs, an information distribution plan, managing stakeholder expectations, and reporting on the performance of the project. In short, this is where effective project reporting comes together and requires planning on the information needed from the team (field reports), thoughts on the reporting the PM will provide to the team and the sponsor, and how all of the information will be collected, formatted and delivered. See Appendix C for communication plan templates.

The stakeholder analysis and a communication matrix will determine the information to be provided to each group and how the reports will be distributed. Careful planning in this step will consider how to manage stakeholder expectations. The goal to get the pertinent information to the correct audience on a regular basis, so confidence in the project is high.

Field report expectations need to be clearly defined for each team member. This includes what tasks she is responsible for, the format of the regular reporting, information to be reported, and the interval/day the information is needed.

A communication matrix can be used to organize the many reporting requirements and distribution interval. This is an example of a communication matrix:

Communication Type	Description	Frequency	Format	Participants/ Distribution	Deliverable	Owner
Weekly Report	Summary/ highlights	Weekly	Email	Team	Status, Progress	Project Manager
Field Report #1 Weekly Team - Circuits	Circuit migration progress	Weekly	E-mail or In Person	Circuit Team	Circuit migration status/issues, # of sites commissioned, billing questions, COGS/target list issues	Stephanie, George, Bryony, Nancy
Field Report #2 Weekly Team – MFA/OSP	OSP/MFA progress	Weekly	E-mail or In Person	MFA/OSP Team	Q forecast status, OSP term progress, install & commission issues, MFDB updates	Donna, Bruce, George
Field Report #3 Pre – Q Prep	Review targets for next quarter and scrub list	30 Days Prior to Q	E-mail or In Person	Team	Agreement on next Q target list, DDOA status, circuits, MFA inventory, risks,	Donna, Bruce, George, Stephanie
Post-Q Review	Review previous Q work	Within 30 days end of Q	E-mail and In Person	Team	Quarterly completions, variance analysis, run rate actual & forecast, lesson's learned	Donna, Bruce, George, Stephanie
Executive Report	Summary and forecast	TBD	E-mail and In Person	Sponsor, Managers	Scope, schedule, budget dashboard	Donna
Monthly Review	Metrics and forecast	Monthly If Needed	E-mail and In Person	Team	Q forecast, status/progress highlight report from key team members, lunch	Donna, Bruce, George, Stephanie

Source: D. Neill
EXHIBIT NO 1. Communication Matrix Example

This is a visual example of a communication plan for a project that includes information needed by the team, the deliverables to be reported on, and the reports the PM will generate and distribute to the team.

Source: D. Neill
EXHIBIT NO 2. Communication Plan Project Reporting Overview

Initiating & Planning Phase Reporting

Establish Baseline Measurements

Baseline scope, schedule, budget, risk and quality measurements are determined in the Initiating and Planning stage of the project. They should be reviewed, discussed, and accepted by both the sponsor and team because they are critical to keeping the team on schedule and motivated during the execution phase. The baseline measurements will be used to monitor and control progress, to gauge project status, and to identify project distress—so consider these expectations and dates carefully.

- Define project scope based on the final project product requirements and the set of deliverables needed to accomplish the desired product. Each deliverable should be a verifiable product, result or capability to perform a service. Consider contractual and standard performance agreements.

- A milestone schedule is built around project deliverables with the necessary completed by dates assigned to keep the project on schedule and to reflect project status and distress. It is also important to bear in mind the team is best motivated by clear, attainable incremental challenges throughout the project. See Appendix D for a milestone schedule example.

- There are two effective ways to establish the budget baseline. One is to use a run rate or burn rate chart (Exhibit No. 3). The second is to use an Earned Value Management (EVM) S-Curve (Exhibit No. 4). See Appendix E for a budget run rate chart template or Appendix F for an EVM S-Curve template and Appendix G for an EVM Pocket Reference Guide.

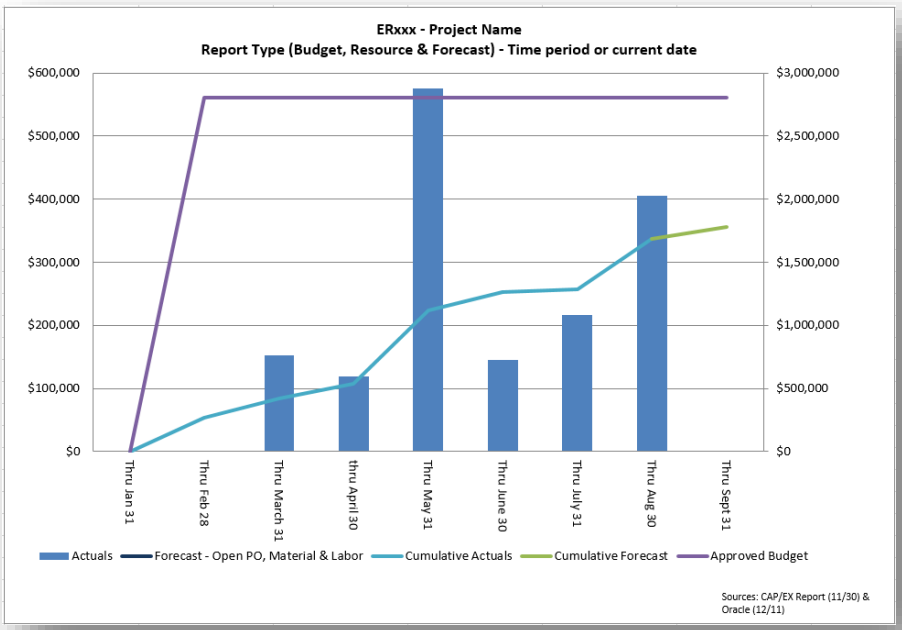


EXHIBIT NO. 3 Dual Axis Run Rate Chart

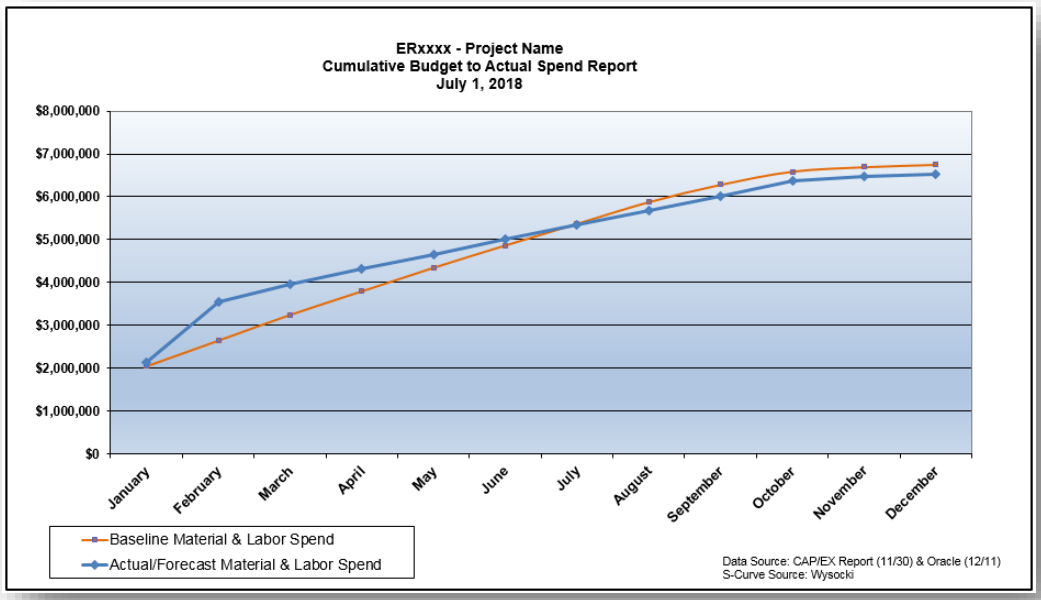


EXHIBIT NO 4. EVM-S Curve Cumulative Costs Chart

- The initial risk assessment considers potential events that may occur during the project and should be used to assess the level on contingency needed for the capital request. The minimum assessment performed by the team should identify and prioritize potential risks, determine risk indicators or early warning signs, and determine what initial steps should be taken to address each identified risk. A team member should be assign to monitor the risk and report to the team when the risk trigger occurs. See Appendix H for the risk analysis template.

- Quality baseline measurements include ways to verify the final product will meet or exceed committed or contractual requirements and technical specifications. Quality checks for each deliverable should be quantifiable and measurable. Examples of quality checks include 1). Determine and implement industry standard or contractual testing requirements, and 2). Develop and/or or use an existing checklists created from lessons learned on past projects of task requirements (continuous learning). See Appendix I for a checklist example.

Reporting to Motivate the Team to take action

Effective project managers plan their project baseline and milestone dates with care so each can be used as an early warning for potential slips in schedule or budget. Good reporting in the execution phase is dependent on these measurements, as they are made before the pressure of project execution occurs. Good baseline milestones will both motivate the team and manage expectations of the project by accurately calling out status and progress to date and a forecast—good or bad—of project completion based on performance to date. The team is best motivated by clear attainable challenges throughout the project.

Execution, Monitor & Control Phase Reporting

Verify Scope, Schedule, and Budget

Project deliverables must be verified and reported on during the execution phase to confirm the agreed upon technical or desired specifications for the project product will be met. Periodic inspection to monitor & control progress, field reports, site visits and monitoring budget spend is needed.

- Scope verification is accomplished by field reports, site visits, and variance analysis that each deliverable will meet final specifications. An integrated change order control process is used to avoid scope creep and includes requiring change requests to be made in writing, time for an evaluation process to determine the validity of the request and the impact to the schedule and budget, and a formal approval of the change. See Appendix J for a Scope Change Order Tracker template.

- Schedule verification is accomplished by comparing work completed to baseline milestones. Always track the date a deliverable or significant task is completed. When verifying and tracking completion dates, the project manager must determine the quality and percentage of work that has been completed. What equals done for an individual team member is always subjective.

- Budget verification is accomplished by pulling a budget report from Oracle and comparing work charged to the expected spend. Excel pivot tables are used to categorize totals on material and labor charges to see who is charging time to your project and which vendors are being paid for their services. Accruals must be considered (payments that are planned but have not yet been paid), and therefore it is suggested the budget pull from Oracle occur once a month afterhe 10th day to make certain accruals are posted. See Appendix K for steps to pull the Oracle budget report and Appendix L for suggested pivot table formats.

- Risk verification is accomplished by monitoring initial risk assessment and periodically considering new potential risks.

- Quality verification is accomplished by verifying scope, schedule, and budget, confirming contractual specifications will be met, and using checklists developed in the planning phase.

Perform Periodic Variance Analysis of Actual to Baseline

The project manager must provide the early warning alert on a distressed project and determine when corrective action is needed. The variance analysis is an effective tool to determine factual information on project status when baseline dates are missed, or negative field reports are received. A variance analysis is an after-the-fact look at what caused the difference between the baseline expectation and the actual performance.

Common steps to take for variance analysis:

- Verify the quality of the information collected to ensure it is accurate, complete and credible to your analysis;

- Determine the variance by comparing the actual dates or number of tasks, items, etc. completed as compared to baseline;
- Note both favorable and unfavorable issues; and
- Consider weekly or monthly trends to determine if the issue is a one-time problem, has gone away or is increasing.

Once the variance is known, the PM must analyze the data, determine how it impacts the project, and determine if corrective action is needed. If a schedule delay or budget overrun is expected it is called out on the next weekly report as a forecast.

Execution Phase Scope, Schedule, Budget, Risk and Quality Reporting

When reporting during the execution phase, consider both the type of information to report on the type of statements used.

Although not all information is needed on every report, consider the following when reporting:

- Scope reporting will include:
  - How scope technical specifications and status is verified – team discussion, site visits.
  - Change to scope requests and impact to schedule and budget for approved changes.

- Schedule reporting will include:
  - Concerns about potential schedule slips and what is being done to prevent a slip
  - Discussion on options if a delay will occur and the impact to schedule and budget:
    - Offering overtime to existing team members – budget impact
    - Adding internal or external resources – budget
    - Hiring expertise that is not available in-house – budget
    - Accepting longer schedule – budget, schedule
    - Considering a two-phase approach to meet all deliverables and current schedule – scope, schedule, and budget

- Budget reporting will include:
  - Current spend to date;
  - Actual spend to baseline spend;
  - Outstanding POs or issues related to budget;
  - Steps being taken to control budget; and
  - Forecast of over/under spending for project.

- Risk reporting will include:
  - Highly likely risks;
  - Risk trigger, initial response plan, and team owner; and
  - Expected impact to scope, schedule or budget if it occurs.

- Quality reporting will include:
  - Scope verification and Integrated change control;
  - Budget or schedule verification;
  - Quality assurance audits; and
  - Checklist items.

Project report statements generally fall into four categories: status, progress, forecast and burn rate. Ad Hoc reports to focus specifically on one of these four can be requested, but in general, the weekly reports will contain a bit of all four. Things to consider for each type of statement:

- Status – provides a snapshot view of what is happening to date;
- Progress – shows what has happened since the last report or a specific period of time;
- Forecast – an estimate of time and budget to finish the project; and
- Burn Rate – shows what has occurred in the past.

Developing and Implementing a Get-Well Plan for Distressed Project

The Get-Well Plan pulls all of the project assessment and management tools together. It is important not to underestimate how difficult it is to get the team to agree a project is in trouble early on. Complex projects and optimism that all will come clear can make it difficult to pinpoint project distress. Baseline measurements and checklists made in the planning phase of the project are extremely useful to begin discussions of project distress during the execution phase. Gauging reactions and reading body language is important as well; therefore, sharing concerns with the team members at meetings or site visits is suggested.

Consider these common reasons for not identifying when a project is in distress (Klagegg, et all, 2010):

- Easy for team to be overly optimistic;
- Not enough external input (groupthink);
- Too much trust placed in experienced people;
- Motivation bias – if we actually have a problem then we actually need to take corrective action;
- Don't want to deal with conflict when another group/team member is behind;
- Preference to blame others rather than focus on an individual's work; and
- Corporate politics or power plays.

Taking Corrective Action

When it is clear that a project is in trouble through variance analysis to baseline measurements and/or negative field reports, it is important to put together a Get Well Plan that includes the corrective action needed to get the project back on track and calls out the impact to schedule and budget (triple constraint).

The project manager will develop the plan, but then it should be discussed in person when possible with the sponsors and key team members so that assumptions can be explored and challenged before it is presented to the team. The plan should be clear, have key deliverables and milestones and (where possible) checklists of tasks and assigned resources. Talk with the team to make sure they can meet requirements on requested schedule.

Closing Phase Reporting

It is recommended the PM report on the following topics in the final project report:

- All POs have been received/paid;
- All material has been used or dispersed/disposed of properly;
- GL Account closed and no longer available in Kronos;

- Incentive pay, if applicable, has been processed;
- Final Budget; and
- Lessons Learned and any Best Practices identified (continuous learning).

Practice Continuous Improvement

The concept of organizational project management maturity is based on continuous improvement and identifying and using best practices. Each GCI project manager should always be mindful of current PMO best practices and through lessons learned meetings identifying and sharing newfound best practices with the PMO.

The goal is for GCI as an organization is to continue to evolve up the Project Maturity Level:

1. Basic project management processes and language are used.
2. There are individual project planning and common processes.
3. There is singular methodology by all for project planning and control.
4. There is process improvement and benchmarking discussed and considered.
5. Continuous best practices process improvement is implemented.

As a good project manager at GCI always considers your role as a good custodian of practicing continuous improvement and organizational project maturity.

Project Reporting For Results Checklist

Reporting Basics

- Have you considered the reporting equilibrium for the team?
- Have you shared your communication plan and reporting style with the sponsor? And the team?
- Have key team members agreed to your requested field reporting format and frequency?
- Have you discussed pre-established 'acceptable ranges' on reporting status? What is green?
- Is effective communication planned for the team with regular project meetings scheduled?
- Do you have an agenda for your meetings? Do you plan to use the notes template to track project tasks, issues, and history?

Initiating & Planning Phases

- Have you established baseline measurements for scope, schedule, budget, risk and quality? Have they been reviewed and accepted by the team sponsor and key team members?
- Do you have a plan to verify project deliverables to technical specification or contractual requirements?
- Do you plan to use an integrated change control process that documents all scope change requests?
- If a change request is approved, do you plan to consider the impact of the scope change to the schedule and budget (Triple Constraint)?
- Have you developed baseline milestones in the planning phase for comparison to actual work analysis in the execution phase?

Execution, Monitor & Control Phase Reporting

- Have you considered the type of information to share on scope, schedule, budget, risk and quality during the execution phase to show you are monitoring and controlling the work?
- Is the reported information quantifiable and measurable?
- Are you distinguishing between status, progress and forecast statements?
- Are the schedule and budget forecasts considered and updated periodically?
- Are you tracking task and milestone completion dates?
- Is the team aware of the next milestone and the current effort to meet the date?
- Are you prepared to develop and implement a get-well plan if needed?

Closing Phase

- Did you close out your project and provide a final report?

Practice Continuous Learning

- Have you held a lessons learned discussion with the team and captured best practices?
- Have you shared valuable lessons learned and best practices with team, sponsor and PMO library to support continuous organizational learning?

Project Management Office (PMO)

Project Reporting for Results Guide Template Workbook

This document can be found in the General Communication, Inc. (GCI) Project Management Office (PMO) library located at: to be provided once established. It is intended to be used by project managers at GCI to show the process and documents used for reporting. Once familiar with this guide the PM may choose to use it as a reference document as needed at each phase of the project or when starting new projects. This workbook accompanies the 'Project Reporting for Result' guide. Additional project management tips, tools and robust lessons learned documentation can also be found at GCI PMO library.

Weekly Report Template

GCI	Erxxx & Project Name

Project Name:				Project ER #:	
Project Sponsor:				Project Manager:	
Project Goal:					
Overall Status:	GREEN	Start Date:		End Date:	
		Summary and explanation for any variance from plan:			
Status as of: 5-May-16	Scope:	GREEN			
	Schedule:	GREEN			
	Budget:	GREEN			

Budget	Original Forecast	Current Forecast	Expended to Date	Estimate to Completion	Variance
	$	$	$	$	$

Overview

Scope

Deliverables

Team

Where are we going?		Baseline	Forecast
1	Scope, schedule or budget issues		
2	scope, schedule or budget verification results		
3	Progress or status statements		
4	What is happening next week, the week after on specific deliverables or tasks		
5			

What's in our way?		Mitigation/Action	Back to "Green" Action
1	What is currently holding the project up and who is responsible		
2	What future issues/risks are we concerned about today		
3			
4			
5			

Gree	Within +/- 10% on schedule and budget and meeting milestones. The project risks and issues have been identified and are under control. Likeliness and Impact of risk is minimal.
ello	=<10% Over/under budget or schedule. Overall things are under control but the project may contain a few high-impact risks and/or issues. Successful recovery plan is being executed and is expected to cure problem.
Red	>10% Over/under budget or schedule and/or a number of high-impact risks and/or issues are impacting performance. The project is behind schedule and a Get Well plan is needed.

Source: Kerzner

Project Notes Template

GCI 400 COGS Initiative Weekly Coordination Meeting

Date	Agenda for Tuesday, October 4th, 2016	
Meeting Held	Every Tuesday 10:30-11:30 AM in the 7th Floor DT Conference Room	
Conference bridge	644-4119 pin 0122 or 1-800-770-6845 pin 0122	
Project team	Donna Neill –Project Manager	Hans Clark – Dir. CCM (Project Sponsor)
	Stephanie Janssen – CSD PM	Mark Truog – Sr Mgr. Finance & Admin
	Ellen Brooks – Circuit Engineer	Nancy McGuiggan – Sr Mgr. Major Cost Projects
	Hank Buettner – MW RF Engineer	Allen Coughlin – MFA PM
	Jenny Jones – MW RF Engineer	Dorothy Willworth – Sr Mgr. CSD
	Doug Staats – MW RF Engineer	Lisa Wurts – Sr Mgr. Circuit Engineering
	Paul Dowling – Dir. Core Access & Ops	Johnny Cosgrave – Sr. Mgr. Core Mgmt/Core Prov/OPS
	Chris Mace – Dir. Core IP/Transport Eng.	Rodney Carlson – Mgr Core Provisioning
	Gary Haynes – VP OSP	Steve Bailey – Mrg Core Management
	Bruce Rein – Dir. OSP	Chris Gill – Dir. PM&I
	Tom Zulz – VP Statewide Consumer Ops	Dennis Hardman – VP Rural Network Ops.
VACATIONS		
Critical Items		

Project Scope:

Eliminate circuit COGS as quickly and efficiently as possible over the next 3 years. Initiative plays a key role in success of the GCI 400 Plan.

Agenda Topics

discussion	**Topic #1**
Update	Notes by date:

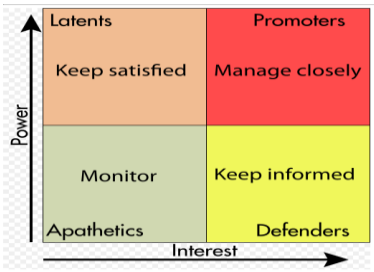
Communication Management Plan Templates

The Project Manager will take the lead role in ensuring effective communications on this project.

Stakeholder Register and power/interest analysis

MTA COGS Reduction Project		
Name	Title	Status
Executives		
Greg Chapados	Executive	Keep Informed
Jimmy Sipes	Executive	Keep Informed
Shawn Fitzpatrick	Executive	Keep Informed
CCM		
Hans Clark	Director/Sponsor	Manage Closely
Nancy McGuiggan	Projects Manager	Manage Closely
Bryony Ruby	Finance & Admin Manage	Manage Closely
Tim Donn	Finance Analyst	Monitor
OSP		
Gary Haynes	VP	Keep Informed
Bruce Rein	Director OSP	Manage Closely
MFA		
Paul Dowling	Director MFA	Manage Closely
George Seymour	MFA PM	Manage Closely
Carey Schrieber	MFA Transport Engineer	Keep Satisfied
Combined Service Delive	Combined Services Delivery Manager	
Dorothy Willworth	CSD PM	Manage Closely
Stephanie Jansen	Circuit Engineering	Manage Closely
Marty Gibson	Circuit Engineering	Keep Satisfied
Ellen Brooks	Circuit Engineering	Keep Satisfied
Other		
Krag Johnson - AWN		Keep Informed
Mary Devore - Carrier		Keep Informed

Stakeholder power/interest grid (PMBOK)



Distribute Information – Communication Matrix

The communication requirements are documented in the Communication Matrix below. The Communication Matrix will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

Communication Type	Description	Frequency	Format	Participants/ Distribution	Deliverable	Owner
Weekly Report	Summary/ highlights	Weekly	Email	Team	Status, Progress	Project Manager
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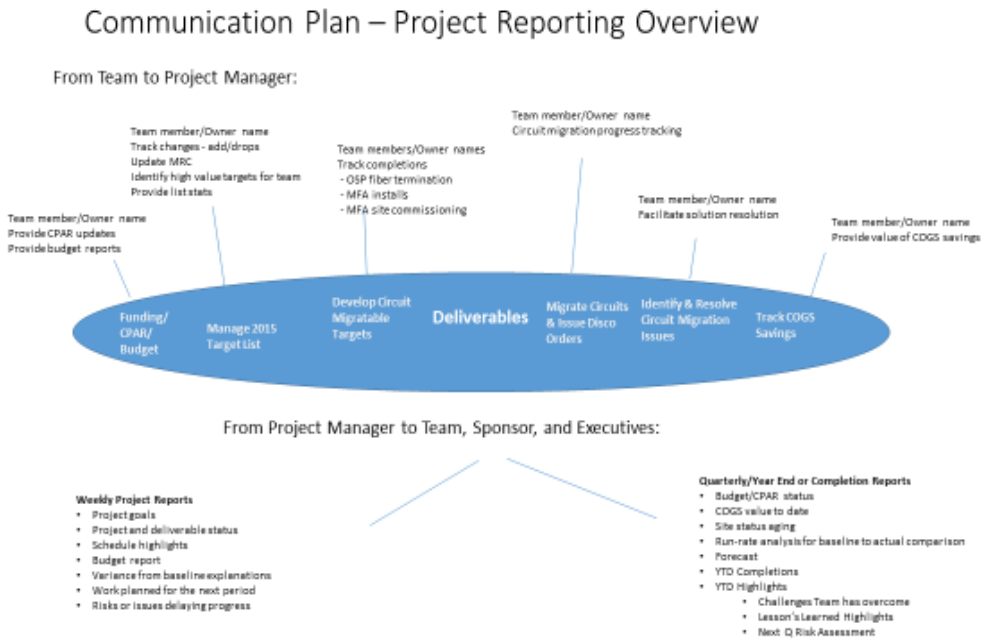
Executive Report	Summary and forecast	TBD	E-mail and In Person	Sponsor, Managers	Scope, schedule, budget dashboard	Donna
Monthly Review	Metrics and forecast	Monthly If Needed	E-mail and In Person	Team	Q forecast, status/progress highlight report from key team members, lunch	Donna, Bruce, George, Stephanie

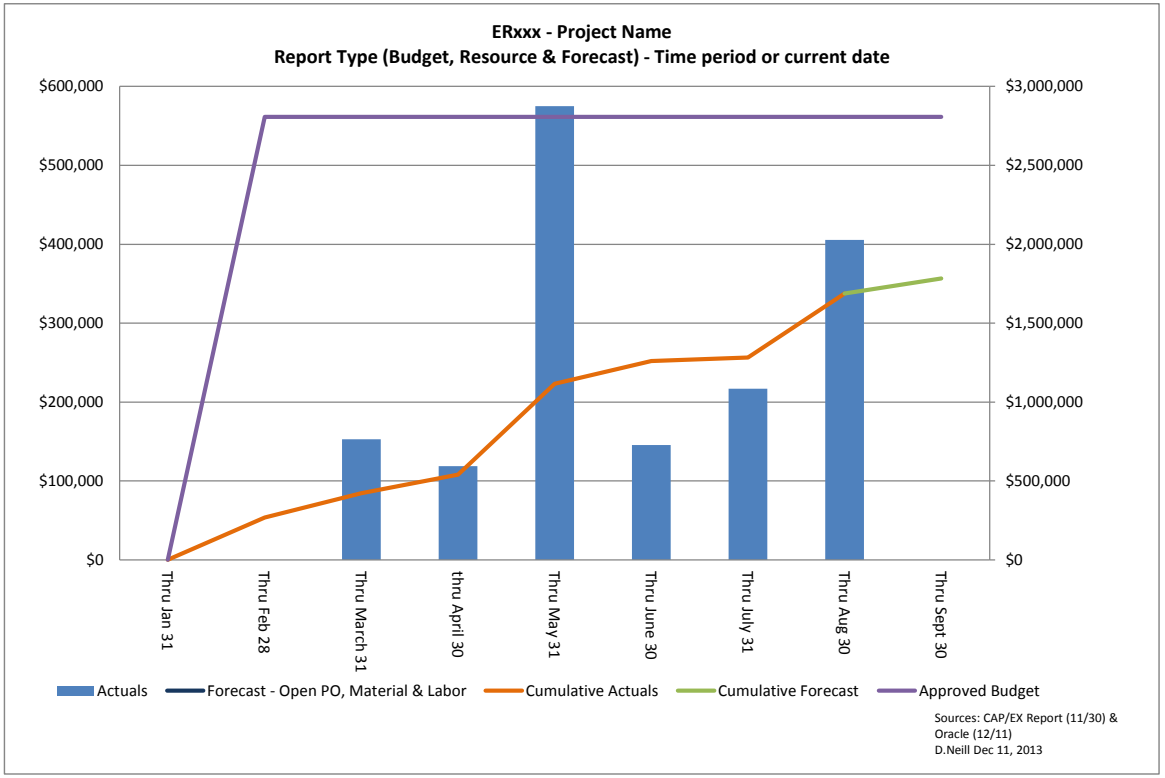


Milestone Schedule Template/Example

GCI PMO Reporting Project Milestone Schedule

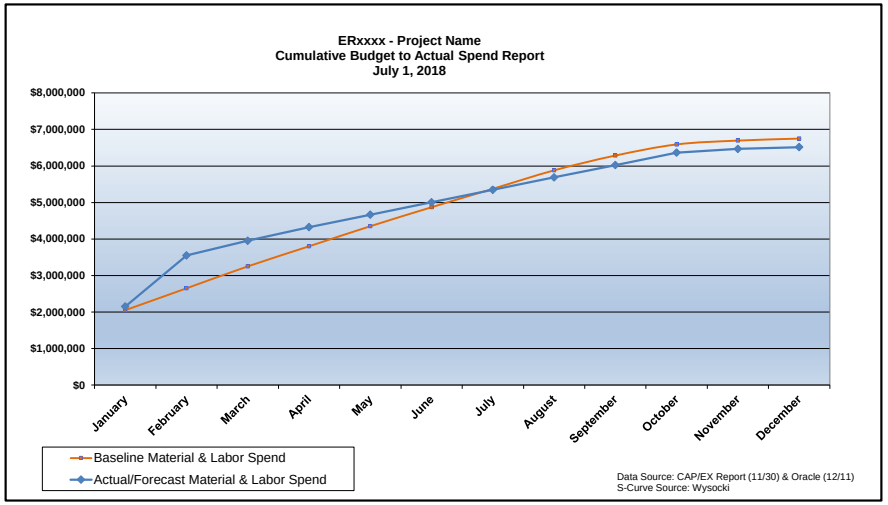
September 23, 2016	PMP and all supporting documents are up to date for 686B Requirement for PPM#1
September 23, 2016	Research survey is sent out
October 15, 2016	Feedback on project product is received by advisors and updates have been made
October 15, 2016	Research survey is completed and begin work on results and conclusions
November 4, 2016	Working draft of Written report is ready with proper formatting
November 4, 2016	Research results are completed and prelim conclusions and recommendations are in written format
November 25, 2016	Written Report completed & Draft Slidedeck for 12/5 presentation is submitted
December 13, 2016	All Final Documents submitted to UAA

Run Rate Chart Template



Reporting on Name	Thru Jan 31	Thru Feb 28	Thru March 31	thru April 30	Thru May 31	Thru June 30	Thru July 31	Thru Aug 30	Thru Sept 30
Actuals	$ -		$ 152,802	$ 118,860	$ 574,974	$ 145,488	$ 217,084	$ 405,342	
Forecast - Open PO, Material & Labor									$ 95,169
Cumulative Actuals	$ -	$ 268,637	$ 421,439	$ 540,299	$ 1,115,273	$ 1,260,761	$ 1,282,845	$ 1,688,187	
Cumulative Forecast								$ 1,688,187	$ 1,783,356
Approved Budget	$ -	$ 2,806,501	$ 2,806,501	$ 2,806,501	$ 2,806,501	$ 2,806,501	$ 2,806,501	$ 2,806,501	$ 2,806,501

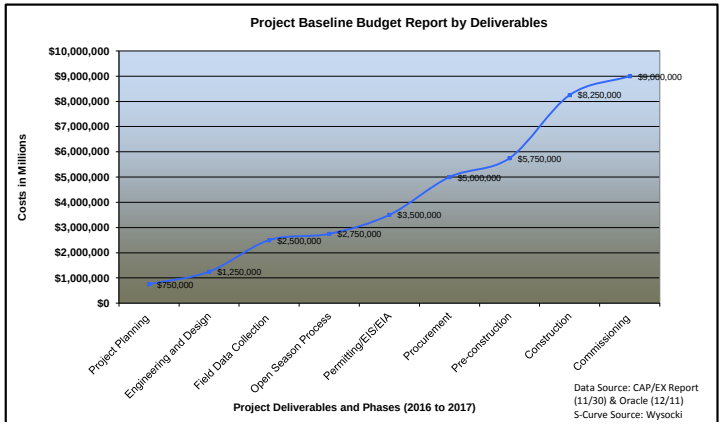
EVM S-Curve Cumulative Costs Chart Template



Expected Spend per Month	January	February	March	April	May	June	July	August	September	October	November	December	
Material	$ 1,550,000	$ 100,000	$ 100,000	$ 50,000	$ 50,000	$ 20,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 5,000	$ 1,900,000
Labor	$ 500,000	$ 500,000	$ 500,000	$ 500,000	$ 500,000	$ 500,000	$ 500,000	$ 500,000	$ 400,000	$ 300,000	$ 100,000	$ 50,000	$ 4,850,000
Baseline Material & Labor Spend	$ 2,050,000	$ 2,650,000	$ 3,250,000	$ 3,800,000	$ 4,350,000	$ 4,870,000	$ 5,375,000	$ 5,880,000	$ 6,285,000	$ 6,590,000	$ 6,695,000	$ 6,750,000	
Actual/Forecast Spend per month							Forecast/Estimate to Completion						$ 6,750,000
Material	$ 1,750,000	$ 800,000	$ 100,000	$ 75,000	$ 40,000	$ 40,000	*$ 40,000*	*$ 40,000*	*$ 40,000*	*$ 40,000*	*$ -*	*$ -*	$ 2,965,000
Labor	$ 400,000	$ 600,000	$ 300,000	$ 300,000	$ 300,000	$ 300,000	*$ 300,000*	*$ 300,000*	*$ 300,000*	*$ 300,000*	*$ 100,000*	*$ 50,000*	$ 3,550,000
Actual/Forecast Material & Labor Spend	$ 2,150,000	$ 3,550,000	$ 3,950,000	$ 4,325,000	$ 4,665,000	$ 5,005,000	$ 5,345,000	$ 5,685,000	$ 6,025,000	$ 6,365,000	$ 6,465,000	$ 6,515,000	$ 6,515,000

S-Curve Budget Report Baseline to Actuals - Option 2

Project Baseline Budget Report		
Activity/Task	**Deliverable Costs**	**Cumulative Cost**
Project Planning	$750,000	$750,000
Engineering and Design	$500,000	$1,250,000
Field Data Collection	$1,250,000	$2,500,000
Open Season Process	$250,000	$2,750,000
Permitting/EIS/EIA	$750,000	$3,500,000
Procurement	$1,500,000	$5,000,000
Pre-construction	$750,000	$5,750,000
Construction	$2,500,000	$8,250,000
Commissioning	$750,000	$9,000,000
Total Cumlative Cost		**$9,000,000**



EVMS POCKET GUIDE FOR FERMILAB PROJECT MANAGERS

September 2009 Version 2

Earned Value Management is a project management technique for measuring project progress in an objective manner. EVM has the unique ability to combine measurements of scope, schedule, and cost in a single, integrated system. When properly applied, EVM provides an early warning of performance problems.

DOE projects at Fermilab must be managed to meet cost, schedule, and technical requirements. EVM is a critical component of being successful in managing projects. This pocket guide is designed to provide project managers a quick reference for the elements of the FRA Earned Value Management System.

REFERENCES

Requirement Documents

DOE Order 413.3A

FRA EVMS Policy

Fermilab OPMO Project Management Procedures, 12.PM-001 to 12.PM-008

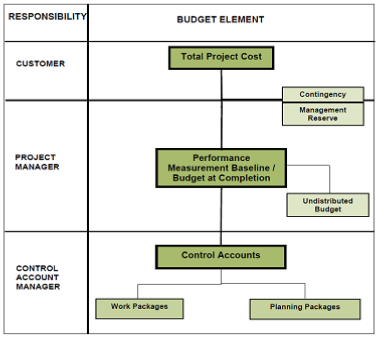
Guides

DOE Guide 413.3-10

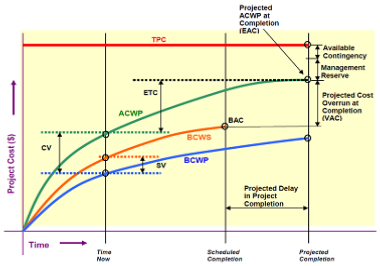
Link to these documents at:

http://www.fnal.gov/directorate/OPMO/OPMOhome.htm

PROJECT BASELINE BUDGET HIERARCHY



EARNED VALUE GRAPH



PERFORMANCE MEASUREMENT TECHNIQUES (PMTS)

When assigning an amount of value (i.e., budget that is claimed, or earned, as the corresponding work is accomplished, the value of work is established for each task by one of the following methods:

Discrete Effort (Effort that produces a tangible product)

Milestone: Milestones are defined, and relative weights are assigned to them. At any point, the value earned is the original work package budget multiplied by the combined weight of the completed milestones and divided by the total weight of all milestones. This method can be applied to any work package and is generally the preferred method for work packages that span more than two fiscal periods.

Percent Complete: The CAM determines percent complete, preferably based on some sort of objective measurement of work completed and remaining.

Units Complete: This PMT is applicable to any work package that comprises a predefined number of similar tasks. The value earned at any point in time is simply the work package budget multiplied by the number of these tasks completed and divided by the total number to be done. Use of this PMT assumes that budgets are based on the units being measured.

50-50: 50% of the value is earned as soon as the work package is started, and the rest is earned when it is completed. This PMT should be used only for work packages that span a maximum of two fiscal periods since value cannot be earned in any intervening periods.

0-100: No value is earned until the work package is completed; at which point, the entire budget is earned. This method should be used only if the work package is scheduled to start and finish in the same fiscal period.

100-0: All of the value is earned as soon as the work package is started. This method should be used only if the work package is scheduled to start and finish in the same fiscal period.

User-Defined %: A variation of the 50-50 PMT. The percentage earned at the start of the work package (1 to 99%) is defined in advance by the user. The remaining percentage is earned when the work package is completed. This method should be used only for work packages whose schedule dates span a maximum of two fiscal periods.

Level of Effort

If the work package is started, it is assumed to progress (and thus earn value) according to the original budget without deviation. This PMT is most suitable for only a small number of work packages that are by their nature immeasurable. By definition, the value earned (BCWP) by an open work package using this PMT is equal to its to-date BCWS.

ANALYSIS CONSIDERATIONS

Favorable and unfavorable variance must be evaluated. CAM must examine the reasons for underruns as well as overruns because these could be masking a serious problem.

Approach

Variance reporting occurs when the red thresholds are exceeded. The project PEP can establish more stringent thresholds, but at a minimum, these are to be used on Fermilab projects:

	Threshold SV%,CV% and SV,CV (CURRENT PERIOD/CUMULATIVE)	Level
	Anything outside yellow or red	Green
DLRS	≥ ± 5% to < ± 10% and ≥ $50k/$100k	Yellow
	≥ ± 10% and ≥ $100k/$200k	Red
HRS	≥ ± 5% to < ± 10% and ≥ 350 hrs/700 hrs	Yellow
	≥ ± 10% and ≥ 700 hrs/1400hrs	Red

Variance analysis research identifies:

- Explanation of variance, including root cause
- Impact
- Corrective action including timing

Areas to investigate:

- Poor initial planning, estimating or specification
- Technical breakthroughs or problems
- Cost of labor or material higher or lower than planned
- Inflation and new labor contracts
- Front end loading
- Funding issues

COST PERFORMANCE ANALYSIS FORMULAS

Schedule Variance SV = BCWP – BCWS

Cost Variance CV = BCWP – ACWP

Variance at Completion VAC = BAC – EAC

Schedule Variance (%)

$$SV\% = \frac{BCWP - BCWS}{BCWS} \times 100$$

Cost Variance (%)

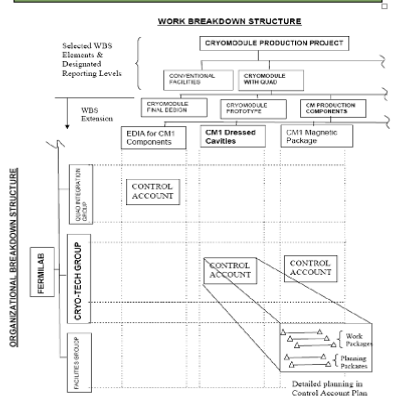
$$CV\% = \frac{BCWP - ACWP}{BCWP} \times 100$$

ESTIMATE AT COMPLETION

EAC = Actuals to Date + Estimated Cost to Complete Work Remaining

Estimate to Complete (ETC). On a monthly basis while generating the MSR, the CAM shall review the ETC for the elements of their control account. The CAM will analyze the accuracy of the current ETC in this way: 1) if the current ETC does not accurately reflect the cost and schedule for the remaining work in the control account, and 2) the total cost of the difference from the current and projected ETC's for the CA would exceed the project manager cost threshold for approving changes, then the ETC should be revised. The ETC shall take into consideration any cost or schedule variances to date, as well as estimates for pending changes and mitigation of known risks. When the Project Manager approves a submitted estimate the Project Manager forwards the information to Project Controls and they update the schedule and cost processor to establish the new project EAC. On at least an annual basis, the project manager will request that all CAMs review their ETC, and submit a detailed, bottoms-up estimate for the remaining work to establish the EAC.

MANAGEMENT AND CONTROL POINTS FIGURE



DEFINITIONS

ACWP	**Actual Cost of Work Performed** Cost of Work Completed (ACTUAL COST INCURRED)
AUW	**Authorized Unpriced Work** Work authorized to start, not yet negotiated
BAC	**Budget At Completion** The total authorized budget for accomplishing the scope of work. It is equal to the sum of all allocated budgets plus any undistributed budget.
BCWP	**Budgeted Cost of Work Performed** Value of work completed (also called EARNED VALUE)
BCWS	**Budgeted Cost for Work Scheduled** Value of work scheduled (PLANNED PERFORMANCE)
CA	**Control Account** A management control point at which budgets (resource plans) and actual costs are accumulated and compared to earned value for management control purposes.
CAM	**Control Account Manager** Member of project team responsible for performance defined in a CA.
Contingency	Portion of the total budget for unknown risks, applied using established approval thresholds and the change control process. Contingency is not part of the PMB.
CPI	**Cost Performance Index** The ratio of earned value to actual costs (BCWP/ACWP)
CV	**Cost Variance** The difference between Earned Value and Actual Cost (CV = BCWP – ACWP.)
EAC	**Estimate At Completion** The latest revised cost estimate for a given work scope.
ETC	**Estimate To Complete** Estimate of costs to complete all work from a point in time to the end of the project.
Management Reserve	**Portion of the total budget for known risks as identified in the risk register, applied using established approval thresholds and the change control process. MR is not part of the PMB.**
MSR	**Monthly Status Report** Report summarizing the monthly status of a project
PMB	**Performance Measurement Baseline** The collected key performance, scope, cost, and schedule parameters.
PP	**Planning Package** A logical aggregate of future work
PMT	**Performance Measurement Technique** A defined method of earning value in relation to the resources expended.
RAM	**Responsibility Assignment Matrix** A structure that relates the project organization structure to the work breakdown structure
SPI	**Schedule Performance Index** A schedule performance indicator relating work accomplished to the planned schedule (BCWP/BCWS).
SV	**Schedule Variance** A metric for the schedule performance on a program. It is the algebraic difference between Earned Value and the Budget (SV = BCWP – BCWS)
TEC	**Total Estimated Cost** The Total Estimated Cost of a project is the specific cost of the project, whether funded as an operating expense or construction.
UB	**Undistributed Budget** Budget associated with specific work scope or contract changes that have not been assigned to a control account.
VAR	**Variance Analysis Report** Allow control account managers to identify and report cost, schedule, and EAC divergences from the performance measurement baseline.
WAD	**Work Authorization Document** Formal documentation of project work scope prior to funding.
WBS	**Work Breakdown Structure** A product-oriented grouping of project elements that organizes and defines the total scope of the project.
WP	**Work Package** A task or set of tasks performed within a control account.

Risk Analysis Template

Risk Identification		Qualitative Rating						Category Impact				Risk Response		
Risk - Completing 686A Deliverables for 686B Go/No Go Review	Phase	Likihood	Impact	Risk Score	Risk Ranking	Risk Urgency	Risk Category	Cost	Schedule	Scope	Quality	Risk Response A-Accept, T-Transfer, M-Mitigate	Trigger	Risk Owner
If tight schedule is not maintained for both the research and final report PM will not be able to make final go/no go gateway review for 686B.	Execution	3	5	15	1	M			x	x		Accept -work hard and watch schedule. Take time off from work if needed to meet project goals.	Missing milestone dates.	PM
If project is not properly monitored and controlled scope creep could occur and sidetrack PM from PPM 1-4 deliverables.	Monitor & Control	2	5	10	2	M			x	x	x	Mitigate - perform scope verification and quality checks.	Missing milestones or negative feedback from advisor(s).	PM
If PM does not meet PPM 1-4 deliverables she will not acquire all the points needed to get an A for the class.	Closing	1	3	3	3	M				x	x	Mitigate - meet all deadlines and deliverables to accumulate all possible points for final grade of A.	Note PPM reviews on schedule and clearly understand deliverables for each review.	PM

Key Terms

Risk: The risk stated in a complete sentence which states the cause of the risk, the risk, and the effect that the risk causes to the project.
Risk Category: Categorization of risks by area of project affected, source of risk or other useful category.
Probability: The likelihood that a risk or opportunity will occur (on a scale from 0 to 1 with 1 being the highest).
Impact: The impact of the risk on the project if the risk occurs (scale from 0 to 10 with 10 being the highest).
Risk Score: Determined by multiplying probability and impact (scale from 0 to 10).
Risk Ranking: A priority list which is determined by the relative ranking of the risks (by their scores) within the project with the number one being the highest risk score.
Risk Response: The action which is to be taken if this risk occurs.
Trigger: Something which indicates that a risk is about to occur or has already occurred.
Risk Owner: The person who the project manager assigns to watch for triggers, and manage the risk response if the risk occurs.
Liklihood and impact scale: 1-5 with 1 as low and 5 as high.

Project Reporting For Results Checklist

Reporting Basics

- Have you considered the reporting equilibrium for the team?
- Have you shared your communication plan and reporting style with the sponsor? And the team?
- Have key team members agreed to your requested field reporting format and frequency?
- Have you discussed pre-established 'acceptable ranges' on reporting status? What is green?
- Is effective communication is planned for the team with regular project meetings scheduled?
- Do you have an agenda for your meetings? Do you plan to use the notes template to track project tasks, issues and history?

Initiating & Planning Phases

- Have you established baseline measurements for scope, schedule, budget, risk and quality? Have they been reviewed and accepted by team sponsor and key tem members.
- Do you have a plan to verify project deliverables to technical specification or contractual requirements?
- Do you plan to use an integrated change control process that documents all scope change request?
- If a change request is approved do you plan to consider the impact of the scope change to the schedule and budget (Triple Constraint)?
- Have you developed baseline milestones in the planning phase for comparison to actual work analysis in the execution phase?

Execution, Monitor & Control Phase Reporting

- Have you considered the type of information to share on scope, schedule, budget, risk and quality during the execution phase to show you are monitoring and controlling the work?
- Is the reported information quantifiable and measurable?
- Are you distinguishing between status, progress and forecast statements?
- Are the schedule and budget forecast considered and updated periodically?
- Are you tracking task and milestone completion dates?
- Is the team is aware of the next milestone and the current effort to meet the date?
- Are you prepared to develop and implement a get-well plan if needed?

Closing Phase

- Did you close out your project and provide a final report?

Practice Continuous Learning

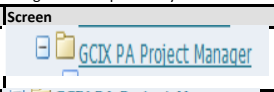
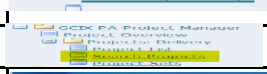
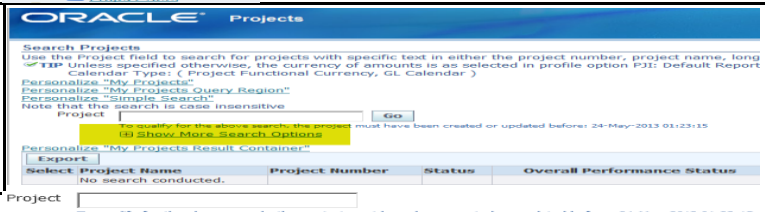
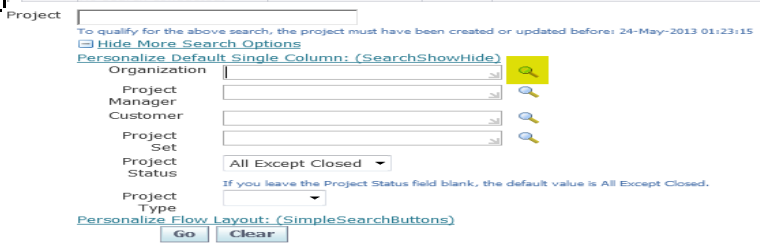
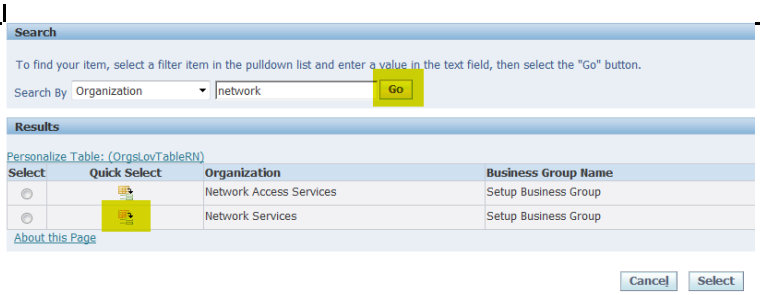
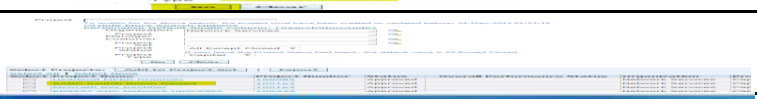
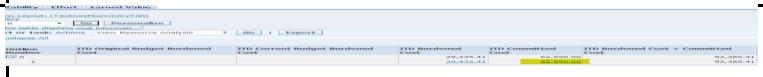
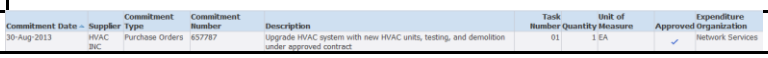
- Have you held a lesson's learned discussion with the team and captured best practices?
- Have you shared important lesson's learned and best practices with team, sponsor and PMO library to support organizational continuous learning?

Scope Change Tracker Template

ER123456 Wrangell ATT CO for COGS Saving						
Change Order #	DATE	CHANGE DESCRIPTION	Affects	Cost	CHANGE REQUESTED BY	NOTES
1	9/23/2015	Including SONET and IP interconnect handoff	Scope, budget, schedule	to be determined. Need cost estimate	Sales team rep.	Proposed change in anticipation of Ethernet provi
2						
3						
4						
5						
6						
7						
8						
9						
10						

Oracle Budget Spend Download Directions

To View commitments though the Search function in Oracle with Project Management Responsibility

	Step	Screen
1.	Login with your Username and Password. Select the **GCIX PA Project Manager** responsibility.	
2.	Navigation: **GCIX PA Project Manager** Projects: Delivery→ Search Projects	
3.	The Search Projects window opens. To view the available search options, click the **Show More Search Options** Link	
4.	The search options appear. Several fields are available for searching. In this example, we'll search for all Network Services Capital projects that are not closed. Click the magnifying glass next to Organization to select the organization	
5.	The Organizations search box appears. Enter part or all of the organization and click on the Go button. The list of organizations will show based on your search criteria. Click the Quick Select icon to select the organization.	
6.	You are taken back to the search options. Enter additional search criteria and click the Go button	
7.	The list of projects matching your search criteria appear. Select the project you want to view by clicking on the Project Name link	
8.	The *Projects Home* window opens. This screen gives you an overview of your project details. Budgets, Actuals, Commitments (purchase reqs and purchase orders) and Forecasts can be viewed from this screen. To view and download the details for the project commitments , click on the **Reporting Tab**	
9.	The *Reporting tab displays* . Select **Task Summary** as the View and click the **Go** button	
10.	The *tasks* are listed Expand the task list and click on the **ITD Committed Cost** Link	
11.	The commitments are displayed and can be exported using the export button.	

Budget Pull Pivot Table Example

Row Labels	Sum of Project Burdened Cost
10972	**6827.32**
KRONOS	**5276.69**
Neill, Donna R	2867.85
Schreiber, Carey E	2022.16
Seymour, George M	386.68
Oracle Payables Supplier Invoices	**1550.63**
BIG G ELECTRIC AND ENGINEERING INCORPORATED	1526
WILLIAMS COMMUNICATIONS OF ALASKA INCORPORATED	24.63
10976	**556.1**
KRONOS	**556.1**
Schreiber, Carey E	556.1
10978	**500**
Oracle Payables Supplier Invoices	**500**
ALASKA RAILROAD CORPORATION	500
10979	**16274.63**
Oracle Payables Supplier Invoices	**16274.63**
MATANUSKA ELECTRIC ASSOCIATION	7900
UTILITY TECHNOLOGIES INCORPORATED	7226.5
WILLIAMS COMMUNICATIONS OF ALASKA INCORPORATED	1148.13
10987	**1388.6**
KRONOS	**873.6**
Seymour, George M	873.6
Oracle Payables Supplier Invoices	**515**
MCALLEN AND SON ELECTRIC INC	515
11004	**769.38**
KRONOS	**769.38**
Collins, Harry J Jr	769.38
11073	**3695.4**
Inventory Misc	**398**
(blank)	398
KRONOS	**582.4**
Seymour, George M	582.4
Oracle Payables Supplier Invoices	**2715**
ALASKA RAILROAD CORPORATION	2400
WILLIAMS COMMUNICATIONS OF ALASKA INCORPORATED	315
11075	**248.25**
Inventory Misc	**199**
(blank)	199
Oracle Payables Supplier Invoices	**49.25**
WILLIAMS COMMUNICATIONS OF ALASKA INCORPORATED	49.25
11109	**1586.41**
KRONOS	**1586.41**
Collins, Harry J Jr	712.81
Seymour, George M	873.6
11113	**556.1**
KRONOS	**556.1**
Schreiber, Carey E	556.1
11191	**10770.35**
KRONOS	**2979.1**
LaTona, Nicole Marie (Nikki)	111.3
Neill, Donna R	2867.8
Oracle Payables Supplier Invoices	**7791.25**
BERING SEA ECCOTECH INC	7194
WILLIAMS COMMUNICATIONS OF ALASKA INCORPORATED	597.25
11423	**1572.06**
Inventory Misc	**398**
(blank)	398
KRONOS	**1174.06**
Crow, Joseph A (Joe)	78.12
Kardell, Kenneth H (Ken)	253.87
Schreiber, Carey E	505.54
Seymour, George M	320.33
Yenter, John Wesley (Wes)	16.2
11428	**7696.18**
GCIX P-Card	**26.74**
Crow, Joseph A (Joe)	16.66
Kardell, Kenneth H (Ken)	10.08
Inventory Misc	**3582**
(blank)	3582
KRONOS	**4087.44**
Crow, Joseph A (Joe)	117.18
Kardell, Kenneth H (Ken)	355.41
Schreiber, Carey E	3134.36
Seymour, George M	480.49
11429	**1112.2**
KRONOS	**1112.2**
Schreiber, Carey E	1112.2
12380	**563.26**
Inventory Misc	**398**
(blank)	398
KRONOS	**165.26**
Kron, Robert C	165.26
12381	**3888.61**
Inventory Misc	**398**
(blank)	398

		KRONOS	**3441.36**
		Neill, Donna R	3441.36
		Oracle Payables Supplier Invoices	**49.25**
		WILLIAMS COMMUNICATIONS OF ALASKA INCORPORATED	49.25
	12383		**7155.36**
		GCIX P-Card	**84.59**
		Crow, Joseph A (Joe)	84.59
		Inventory Misc	**4158.03**
		(blank)	4158.03
		KRONOS	**2785.54**
		Brown, Edward T (Ed)	18.87
		Cascolan, Mark M	50.52
		Crow, Joseph A (Joe)	195.32
		Schreiber, Carey E	2173.84
		Smith, Aaron	346.99
		Oracle Payables Invoice Variance	**46.4**
.AR WIRE PRODUCTS I		GRAYBAR ELECTRIC COMPANY INC	46.4
		Oracle Payables Supplier Invoices	**80.8**
		GRAYBAR ELECTRIC COMPANY INC	23.76
		OPTI STAFFING GROUP	57.04
	12385		**505.54**
		KRONOS	**505.54**
		Schreiber, Carey E	505.54
	12386		**1233.54**
.AR WIRE PRODUCTS I		**KRONOS**	**1233.54**
		Schreiber, Carey E	505.54
		Seymour, George M	728
	12387		**582.4**
		KRONOS	**582.4**
		Seymour, George M	582.4
	12394		**480.48**
		KRONOS	**480.48**
		Seymour, George M	480.48
	12395		**556.1**
		KRONOS	**556.1**
		Schreiber, Carey E	556.1
apc-SCapc 2mil SM 3 M	**12944**		**3363.43**
		Oracle Payables Supplier Invoices	**3363.43**
		MARSH CREEK LLC	3363.43
	Grand Total		**71881.7**

olf Country Tower Line of Site Confirmation

[Project Title]

Earned Value Analysis Report Template

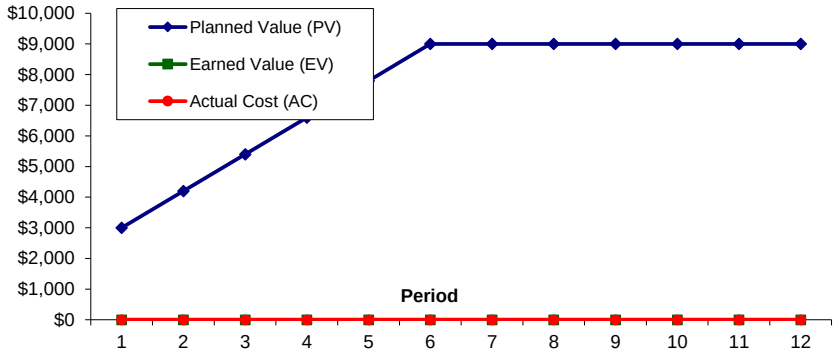
Prepared By: [Manager's Name]

Date: [Report Date]

For Period: _____

Summary:

[Use this space to write a brief summary or to record specific observations or notes]



Planned Value (PV) or Budgeted Cost of Work Scheduled (BCWS)

WBS	Task Nam	TBC	1	2	3	4	5	6	7	8	9	10	11	12
1.1	Task 1	2000	1000	200	200	200	200	200						
1.2	Task 2	7000	2000	1000	1000	1000	1000	1000						
1.3	Task 3	0												
1.4	Task 4	0												
1.5	Task 5	0												
1.6	Task 6	0												
		0												
		0												
		0												
		0												
		0												
		0												
		0												
Insert new rows above this one														
Total Budgeted Cost		**9000**	3000	1200	1200	1200	1200	1200	0	0	0	0	0	0
Cumulative Planned Value (PV)			3000	4200	5400	6600	7800	9000	9000	9000	9000	9000	9000	9000

Actual Cost and Earned Value

Cumulative Actual Cost (AC)	2500	4300	5200	6700	0	0	0	0	0	0	0	0
Cumulative Earned Value (EV)	0	0	0	0	0	0	0	0	0	0	0	0

Project Performance Metrics

Cost Variance (CV = EV - AC)	-2500	-4300	-5200	-6700	0	0	0	0	0	0	0	0
chedule Variance (SV = EV - PV)	-3000	-4200	-5400	-6600	-7800	-9000	-9000	-9000	-9000	-9000	-9000	-9000
erformance Index (CPI = EV/AC)	0.00	0.00	0.00	0.00	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
erformance Index (SPI = EV/PV)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
imated Cost at Completion (EAC)	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

Survey Consent

Thank you in advance for taking the time to complete this survey. The information you provide is extremely valuable to me to improve my capital project implementation progress, status and forecast reporting.

My name is Donna Neill and I am completing my graduate work towards a Masters Science Project Management (MSPM) degree at the University of Alaska, Anchorage (UAA). My Capstone project topic is 'Improved Capital Project Reporting' for the implementation phase of a project. Implementation phase is defined as the project work is in progress. You can reach me at dneill@gci.com or 907 317-9633.

Specifically I am focusing on the following topics for this survey:

1. **Valuable information found on current project status, progress and forecast reports.**
2. **Desirable information to improve project status, progress and forecast reports.**
3. **Specific ways for a project manager to report on target versus late or over budget project issues.**

Survey Consent Section

Your participation in this study is voluntary. If you don't wish to participate, or would like to end your participation in this study, you may quit at any time.

Your name will not be attached to your survey responses. Your name and any other identifiers will be kept in a locked file that is only accessible to me or my research associates. Any information from this study that is published will not identify you by name.

There will be no direct benefit or risk to you for participating in this study.

If you have any questions about this research, please contact the Principal Investigator at the phone number listed above. If you have any questions about your rights as a research subject, please contact Sharilyn Mumaw, Compliance Officer, at (907) 786-1099.

Your consent is provided by choosing to take the survey. Consent indicates that you fully understand the above survey, what is being asked of you in this survey, and that you are completing the survey voluntarily.

Section I - Survey Demographics

1. Which category best describes your involvement with the capital project implementation process?

- ◯ Finance and/or Capital Management
- ◯ Project Manager
- ◯ Project Sponsor
- ◯ Project Team Member
- ◯ Project Customer

2. Please mark any of the following project management credentials you currently posses in good standing:

- ◯ PMP - Project Management Professional
- ◯ MSPM - Master's Degree in Project Management
- ◯ PMI - RMP - Project Management Institute Risk Management Professional
- ◯ PoMP - Program Management Professional
- ◯ PfMP - Portfolio Management Professional
- ◯ Other (please specify)

3. How many years have you been involved with the project implementation process?

- ◯ 1-5 years
- ◯ 6-10 years
- ◯ 11+ years

4. Which company or industry best describes your current involvement with the project implementation process?

- ◯ GCI
- ◯ Other Telecom
- ◯ Contractor
- ◯ Vendor

5. Check all best practices that in your opinion commonly occur in project management in your company:

- [ ] Scope and objectives are clearly defined in the planning stage of a project.
- [ ] Deliverables are defined, reviewed and agreed to by key stakeholders and project sponsor.
- [ ] Project planning for resources and budget is clearly based on scope, objectives and deliverables.
- [ ] Effective communication takes place within the team.
- [ ] Project reporting is discussed prior to implementation and pre-established 'acceptable ranges' are agreed to for the difference between on-target and late/over-budget projects. Example: Project is on target if it is within +/ 10%.
- [ ] Project implementation is tracked and progress, status and forecast reporting is provided.
- [ ] Change management is practiced to avoid scope creep. Scope changes are proposed, reviewed and accepted and then shared with the team
- [ ] Risks, or future events that can adversely impact a successful outcome to the project, are monitored and potential responses considered.
- [ ] Lesson's learned discussions occur in project closing phase for continuous best practice improvement.

6. Choose the level of project management maturity you feel your company is currently operating at:

- [ ] Basic project management processes and language is used.
- [ ] There are individual project planning and common processes.
- [ ] There is singular methodology by all for project planning and control.
- [ ] There is process improvement and benchmarking discussed and considered.
- [ ] Continuous best practices process improvement is practiced.

7. Do you receive status reports on a regular basis when a project is in the implementation phase?

- ( ) I do not receive project reports
- ( ) I read the reports sometimes
- ( ) I read the reports most of the time
- ( ) i rarely read the reports

8. What is your preferred method for receiving project status information?

- ( ) Regular weekly e-mail project status reports
- ( ) Regular weekly project meeting notes/updates
- ( ) In person or phone conversation with project manager
- ( ) Other (please specify)

9. Check each type of reporting styles you would like to see to improve implementation phase project reports:

- [ ] Past performance analysis on work accomplished
- [ ] Status based on pre-established schedule and budget on target ranges
- [ ] Progress reporting on what work was accomplished since the last report
- [ ] Forecast of work to be complete for the next report period
- [ ] Scope change or change management occurrences
- [ ] Future risk concerns; including potential mitigating action, key trigger and POC for response
- [ ] Variance analysis for project that are at risk for being late or over budget
- [ ] Forecast of project completion
- [ ] Clear communication that project is no longer on target and why

10. Check each type of reporting you feel would be useful once it is known a project is in jeopardy of being late or over budget:

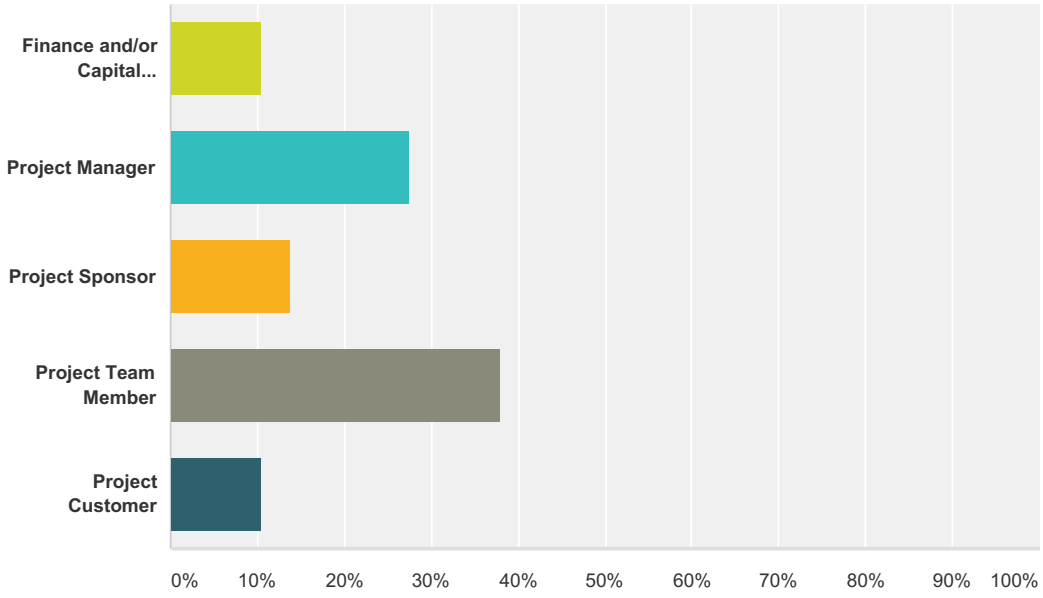
- [ ] More variance to baseline reporting
- [ ] More planned work to actual work reporting
- [ ] More focus on why project is expected to be late or over budget
- [ ] More focus on keeping project schedule and budget from further slippage
- [ ] Suggestions and discussion on getting project back on target
- [ ] Other (please specify)

11. List your top 3 suggestions for project managers to identifying and communicate when a project is in jeopardy of being late and/or over budget.

12. List your top 3 suggestions for improving project reporting in your company:

Q1 Which category best describes your involvement with the capital project implementation process?

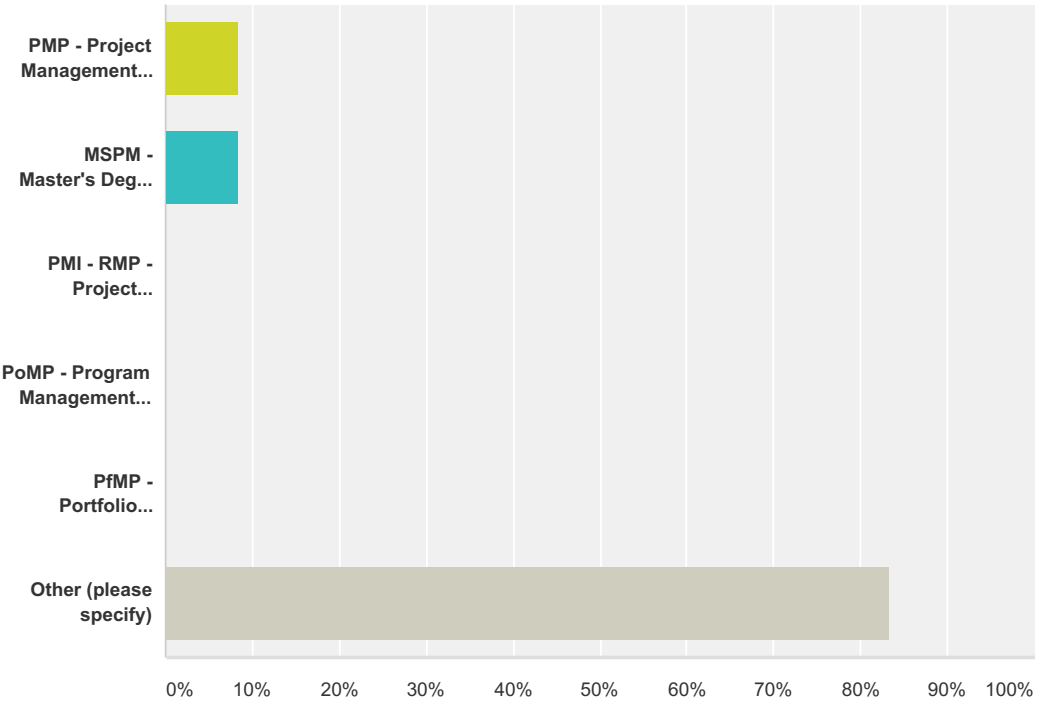
Answered: 29 Skipped: 0



Answer Choices	Responses	
Finance and/or Capital Management	**10.34%**	3
Project Manager	**27.59%**	8
Project Sponsor	**13.79%**	4
Project Team Member	**37.93%**	11
Project Customer	**10.34%**	3
Total		**29**

Q2 Please mark any of the following project management credentials you currently posses in good standing:

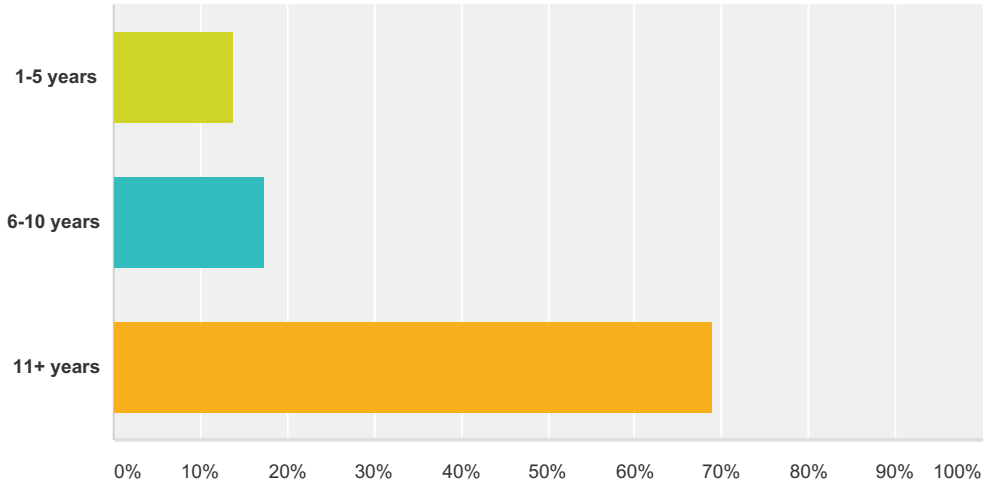
Answered: 12 Skipped: 17



Answer Choices	Responses	
PMP - Project Management Professional	8.33%	1
MSPM - Master's Degree in Project Management	8.33%	1
PMI - RMP - Project Management Institute Risk Management Professional	0.00%	0
PoMP - Program Management Professional	0.00%	0
PfMP - Portfolio Management Professional	0.00%	0
Other (please specify)	83.33%	10
Total		**12**

Q3 How many years have you been involved with the project implementation process?

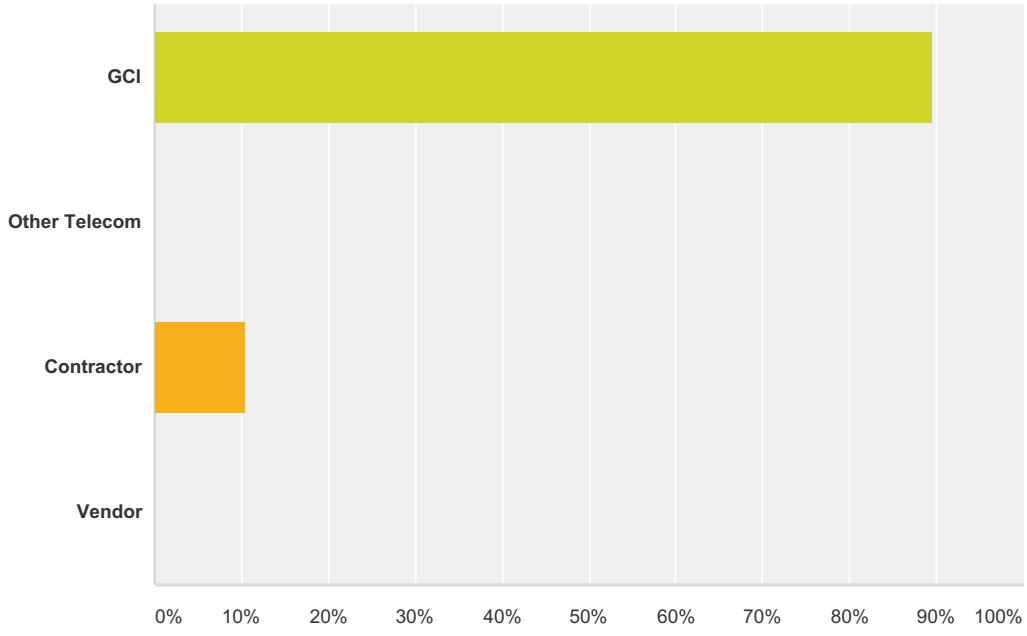
Answered: 29 Skipped: 0



Answer Choices	Responses	
1-5 years	**13.79%**	4
6-10 years	**17.24%**	5
11+ years	**68.97%**	20
Total		**29**

Q4 Which company or industry best describes your current involvement with the project implementation process?

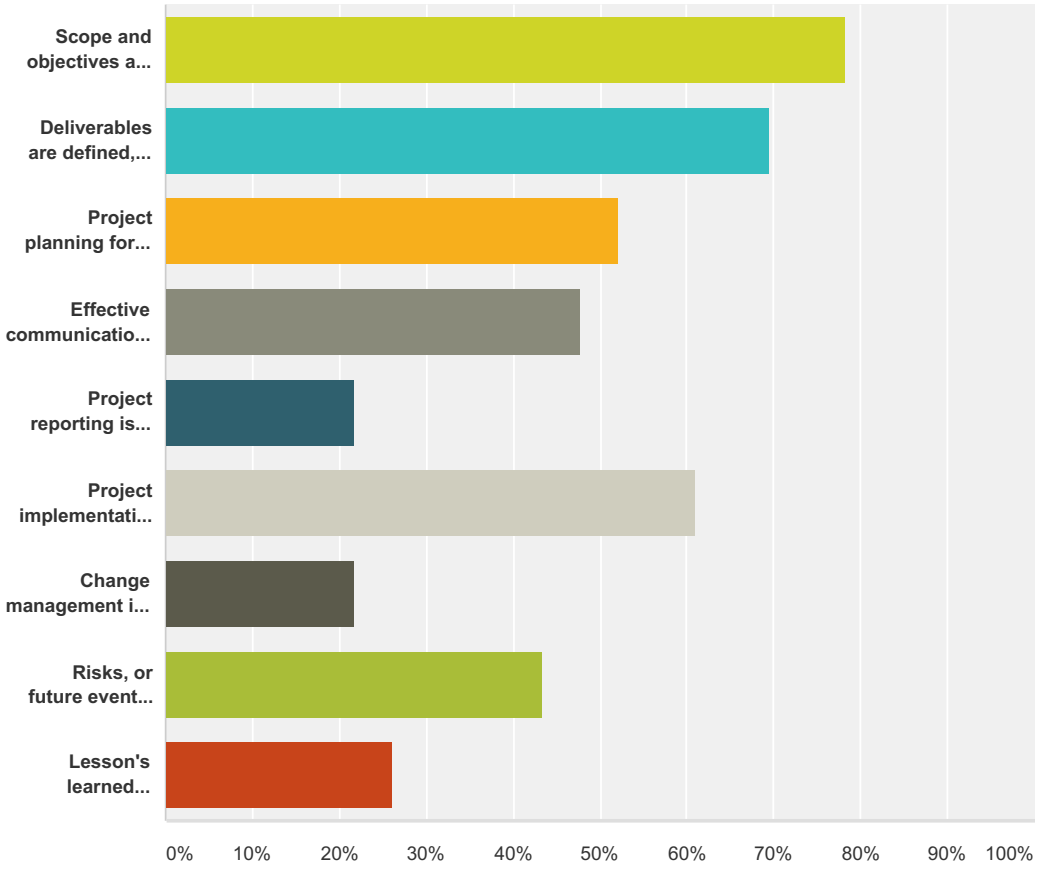
Answered: 29 Skipped: 0



Answer Choices	Responses	
GCI	**89.66%**	26
Other Telecom	**0.00%**	0
Contractor	**10.34%**	3
Vendor	**0.00%**	0
Total		**29**

Q5 Check all best practices that in your opinion commonly occur in project management in your company:

Answered: 23 Skipped: 6

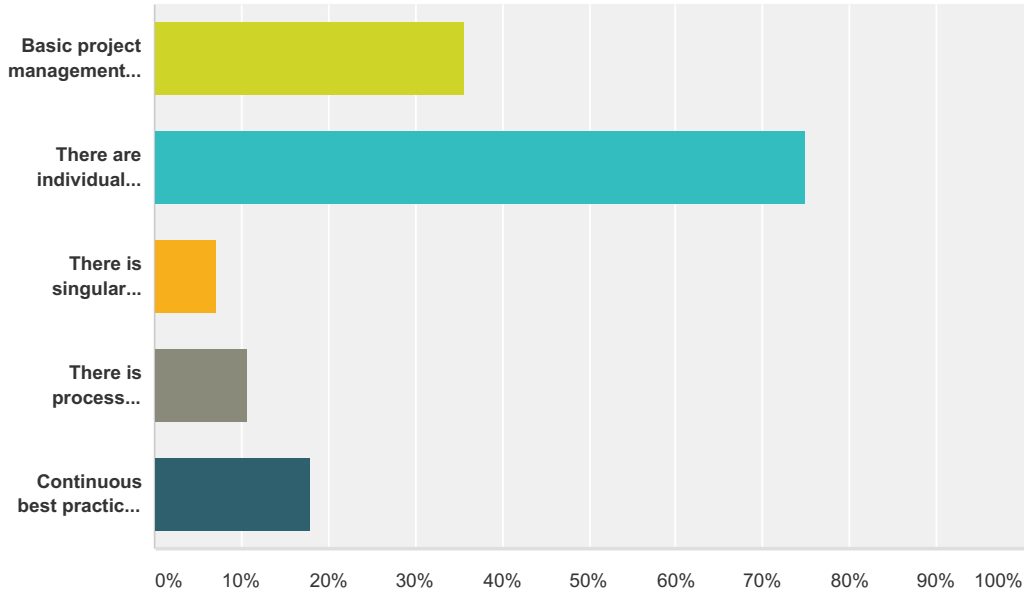


Answer Choices	Responses
Scope and objectives are clearly defined in the planning stage of a project.	78.26% 18
Deliverables are defined, reviewed and agreed to by key stakeholders and project sponsor.	69.57% 16
Project planning for resources and budget is clearly based on scope, objectives and deliverables.	52.17% 12
Effective communication takes place within the team.	47.83% 11
Project reporting is discussed prior to implementation and pre-established 'acceptable ranges' are agreed to for the difference between on-target and late/over-budget projects. Example: Project is on target if it is within +/ 10%.	21.74% 5
Project implementation is tracked and progress, status and forecast reporting is provided.	60.87% 14
Change management is practiced to avoid scope creep. Scope changes are proposed, reviewed and accepted and then shared with the team	21.74% 5

Risks, or future events that can adversely impact a successful outcome to the project, are monitored and potential responses considered.	**43.48%**	10
Lesson's learned discussions occur in project closing phase for continuous best practice improvement.	**26.09%**	6
Total Respondents: 23		

Q6 Choose the level of project management maturity you feel your company is currently operating at:

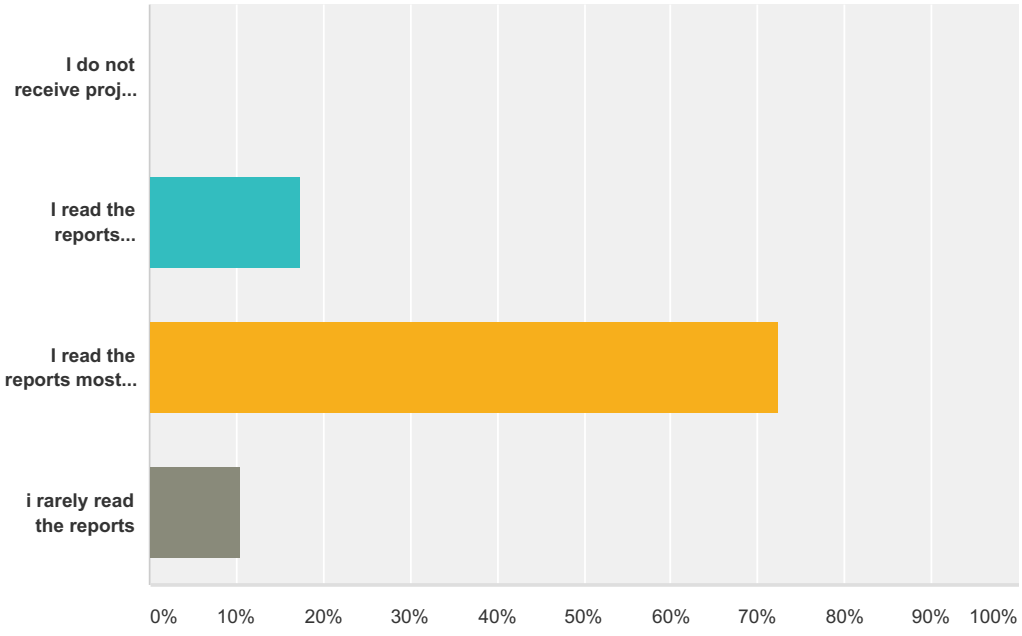
Answered: 28 Skipped: 1



Answer Choices	Responses	
Basic project management processes and language is used.	35.71%	10
There are individual project planning and common processes.	75.00%	21
There is singular methodology by all for project planning and control.	7.14%	2
There is process improvement and benchmarking discussed and considered.	10.71%	3
Continuous best practices process improvement is practiced.	17.86%	5
Total Respondents: 28		

Q7 Do you receive status reports on a regular basis when a project is in the implementation phase?

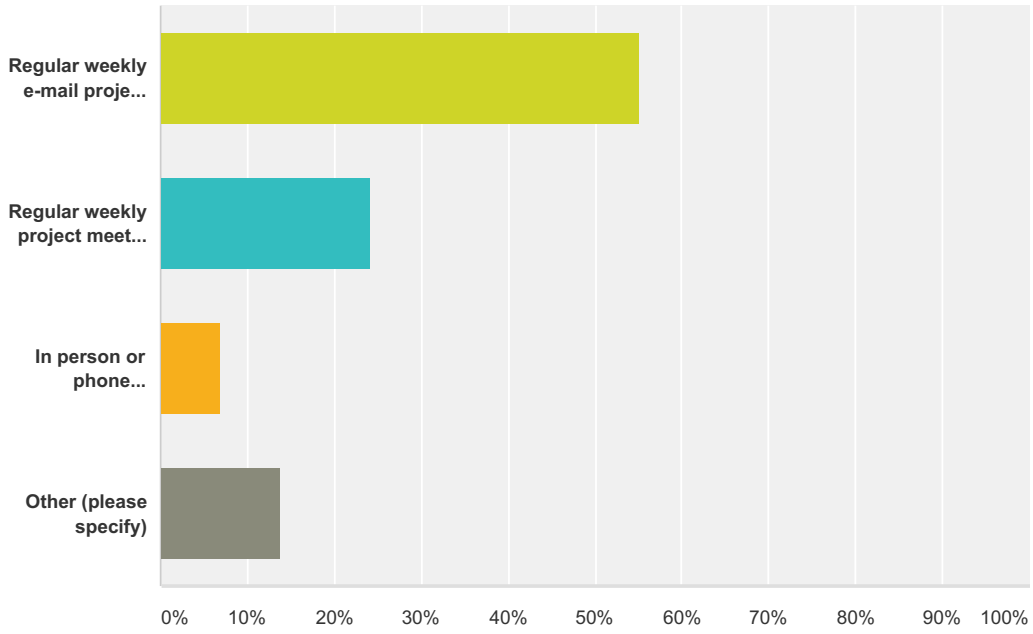
Answered: 29 Skipped: 0



Answer Choices	Responses	
I do not receive project reports	**0.00%**	0
I read the reports sometimes	**17.24%**	5
I read the reports most of the time	**72.41%**	21
i rarely read the reports	**10.34%**	3
Total		**29**

Q8 What is your preferred method for receiving project status information?

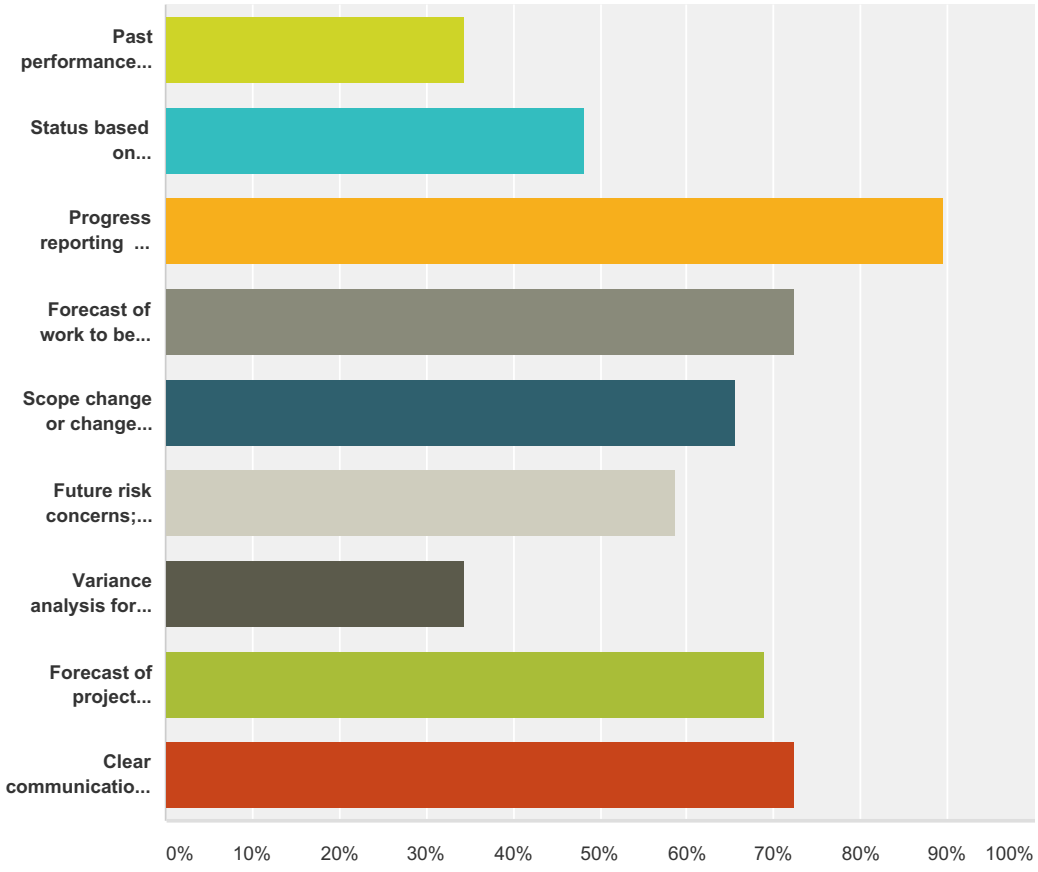
Answered: 29 Skipped: 0



Answer Choices	Responses	
Regular weekly e-mail project status reports	**55.17%**	16
Regular weekly project meeting notes/updates	**24.14%**	7
In person or phone conversation with project manager	**6.90%**	2
Other (please specify)	**13.79%**	4
Total		**29**

Q9 Check each type of reporting styles you would like to see to improve implementation phase project reports:

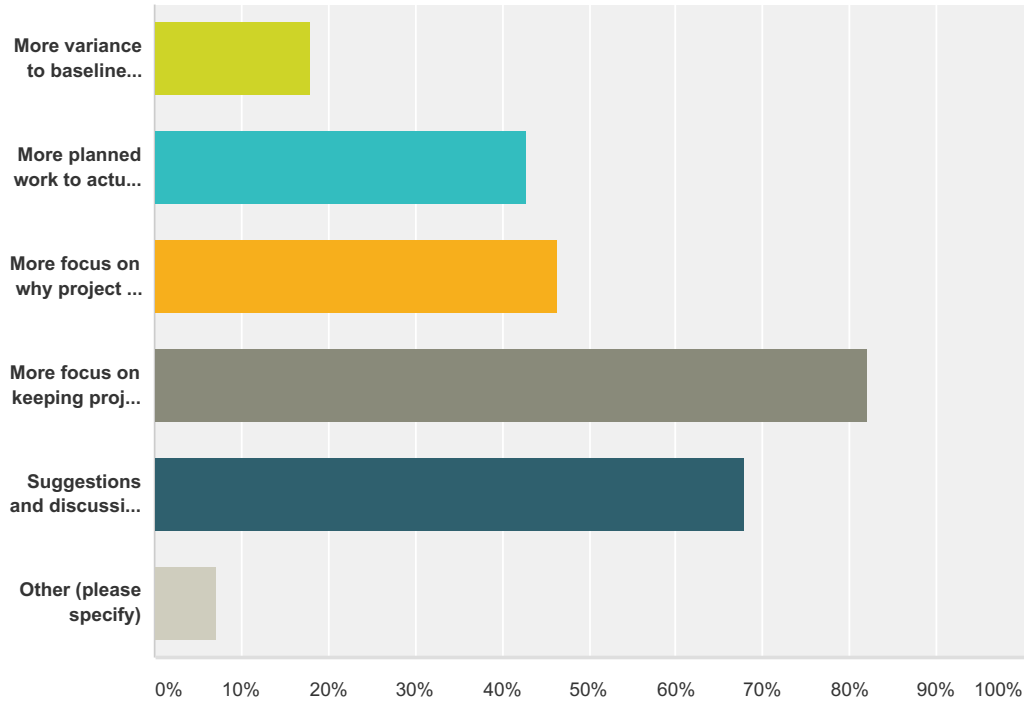
Answered: 29 Skipped: 0



Answer Choices	Responses	
Past performance analysis on work accomplished	34.48%	10
Status based on pre-established schedule and budget on target ranges	48.28%	14
Progress reporting on what work was accomplished since the last report	89.66%	26
Forecast of work to be complete for the next report period	72.41%	21
Scope change or change management occurrences	65.52%	19
Future risk concerns; including potential mitigating action, key trigger and POC for response	58.62%	17
Variance analysis for project that are at risk for being late or over budget	34.48%	10
Forecast of project completion	68.97%	20
Clear communication that project is no longer on target and why	72.41%	21
Total Respondents: 29		

Q10 Check each type of reporting you feel would be useful once it is known a project is in jeopardy of being late or over budget:

Answered: 28 Skipped: 1



Answer Choices	Responses	
More variance to baseline reporting	**17.86%**	5
More planned work to actual work reporting	**42.86%**	12
More focus on why project is expected to be late or over budget	**46.43%**	13
More focus on keeping project schedule and budget from further slippage	**82.14%**	23
Suggestions and discussion on getting project back on target	**67.86%**	19
Other (please specify)	**7.14%**	2
Total Respondents: 28		

Q11 List your top 3 suggestions for project managers to identifying and communicate when a project is in jeopardy of being late and/or over budget.

Answered: 21 Skipped: 8

Q12 List your top 3 suggestions for improving project reporting in your company:

Answered: 19 Skipped: 10