

Draft
General Guidelines
Recommended Format for Periodic Progress Reports

1.0 Introduction

The Periodic Progress Report provides a comprehensive account of the progress made by the Consultant on the project during the reporting period. The report should address successes and breakthroughs as well as issues and problems affecting the progress of the project.

2.0 General

The submission of the Periodic Progress Report is synchronized with the periodic invoice for the same period. The frequency is usually monthly, but is specified in the Compensation and Payment section of the Statement of Work.

At a minimum, the Periodic Progress Report should provide a detailed account of the progress made, specific results obtained, deviations from the work schedule, and planned modifications to the work schedule for the next reporting period. The size of the report is dependent on the complexity of the project and the magnitude of the issues experienced during the reporting period. However, it should be clear and easily readable without repetition.

The report will be used by the Contract Manager and Task Order Manager for progress monitoring and is a prerequisite for acceptance of invoiced costs. Report content should be presented formally during the review meeting to ensure clarity and provide a question and answer period. In order for the report to be of value, it should be provided within at least three working days of the review meeting or other assessment of progress for the period.

3.0 Format

The Periodic Progress Report should be structured as follows (required sections are shown in italics):

- *Cover Page* will include title and number of the project, title of the report, the reporting period, the start date and duration of the task order, etc.
- *Table of Contents*
- *Executive Summary* should provide an overview of the work completed. The Executive Summary should focus on the objectives and main achievements realized during the reporting period, as well as on the expected end results and their expected impacts. Public visibility, external cooperation, and other activities beyond the boundaries of the project should be covered as well.

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- *Work Progress Overview* should be clear and concise giving an overview of the current as well as planned activities:
 1. Specific objectives for the reporting period
 2. Overview of the progress of the project during the reporting period, including:
 - Description of milestones accomplished and any other concrete results achieved
 - A table of deliverables produced during the report period
 - A short description of each deliverable produced during the report period.
 3. Comparison of planned activities and actual work accomplished during the report period indicating deviations from the work schedule with recommendations for corrective action (where necessary).
 4. Clarifications given on comments and recommendations made by reviewers in previous review reports where necessary.
 5. Brief account of planned work for next reporting period.
- *Project Management and Coordination* should provide an overview of project management issues like changes in line or management personnel, concurrent project issues or impacts, etc.
- For types of task orders other than lump sum, the *Cost Breakdown* section should address costs incurred for the reporting period. This information should include a comparison between budget spent and budget allocation. The consolidated costs since the beginning of the project should be given for comparison in a separate column.
- *Information Dissemination* should provide information on actions that have been taken or are planned to disseminate information regarding the results obtained. Such actions might include the consultant's participation in conferences and/or workshops, the publication of articles, brochures, and other material. Details like the name, date, and venue of an event, the number of participants, etc. should be provided.
- *Issues Requiring Attention or Action by the Department* is a list of the most significant issues that have arisen and the recommended resolution. Each of the issues should be organized by order of importance, and carefully considered to determine the possible impact on the project as a whole, particularly the impact on completing the project on time, on budget, and delivering the expected results and benefits.