# Executing, Monitoring & Controlling

## [Project Name]

### Version of TAC 216 Companion Guide: [Version]

### Start: [Date]

### Projected End: [Date]

**Note to the Author**

Use this template to help you track project status and changes during the Executing, Monitoring and Controlling phase. The template includes instructions to the author, boilerplate text, and fields that should be replaced with specific project values.

**Blue** text enclosed in angle brackets (<text>) either provides instructions to the document author, or describes the intent, assumptions and context for content included in this document. **Delete the blue text** as you fill out the document.

**Brown** text enclosed in square brackets ([text]) indicates an example. **Replace the brown text** as you fill out the document.

Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.

Please delete this page before finishing the document.

#### Section 1. Kickoff

Ensure key stakeholders are familiar with the project plan by reviewing the following:

* Project goals and objectives
* Project budget and schedule
* Project team roles and responsibilities, and collaboration methods/tools
* Critical success factors and deliverables acceptance criteria
* Risk and issue management processes
* Project communication strategy
* Change control processes

#### Section 2. Status Reporting

#### Summary

<Enter a high-level summary of the status of the project.>

#### Project at a Glance

| **Status Key** | **Green = On Track**  **G** | **Yellow = Off Track**  **Y** | **Red = Problem**  **R** |
| --- | --- | --- | --- |

| Schedule | Budget | Scope | Quality | Overall |
| --- | --- | --- | --- | --- |
| [Status note] | [Status note] | [Status note] | [Status note] | [Status note] |
| Choose a status | Choose a status | Choose a status | Choose a status | Choose a status |

<Enter an optional one or two word note about status. Color code to match the status on the next line and include G, Y or R in the color block for accessibility. Example: Under Budget the note could say ‘Revised’. Under Overall the note could say “Good Progress”.

Enter the overall status for the topic – use the key and color name and shading above. Example: If project is on budget, change ‘Status’ to the word ‘Green’ and highlight with green.>

#### Cost Status

| Project Item | Report to Date |
| --- | --- |
| Initial  Estimated Project Cost |  |
| Last Reported  Estimated Project Cost |  |
| Current  Estimated Project Cost |  |
| Explanation of Variance  between Last Reported and  Current Project Cost |  |
| Project Cost to Date (Fiscal)  Project Cost to Date (Total) |  |
| Description of  Cost Tracking Mechanism |  |

#### Schedule Status

| Project Item | Report to Date |
| --- | --- |
| Initial Planned  Project Start and Finish Dates: [mm/dd/yy] |  |
| Last Reported  Project Start and Finish Dates: [mm/dd/yy] |  |
| Current Estimated  Project Start and Finish Dates: [mm/dd/yy] |  |
| Explanation of Variance  between Last Reported and Current Start and Finish Dates |  |
| Estimated Percentage of  Project Complete |  |
| Description of Method  Used to Track Progress |  |
| Description of Reporting Mechanism Used to Ensure that Project Participants and Management are Aware of the Project’s Progress |  |

#### Accomplishments Status

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

#### Project Changes

< Describe major project changes (e.g., scope, budget, system requirements, or technology) that occurred during this reporting period. Describe actions for managing the project changes. Please review the Project Change Request template for a more detailed approach to documenting and taking action on project changes.>

| Change Description | Background | Actions for Managing the Change |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

#### Section 3. Communication and Stakeholder Engagement

#### Communication Register

<Use the communications register to manage project communications and stakeholder engagement. Please review the Communication Plan template for a more complete approach to planning and executing communications.>

| Communication Register | | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| Agency/ Organization Name | |  | | | Version Number |  |
| Project Name | |  | | | Revision Date |  |
| What? | **Who?** | | **When?** | **How?** | | |
| Information Requirement Description/ Title | Provider/ Stakeholder | Recipient/ Stakeholder | Timeframe/ Frequency/ Trigger | Format | Medium/ Distribution Method | Storage/ Disposition Method |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

#### Review and Update

Issues Log

Risk Register

Action Items

#### Section 4. Deployment Plan and Deliverables Signoff

#### Deployment Plan

<Develop a deployment plan for Level 3 and 4 projects. You may choose to develop a plan for Level 2 projects.>

| Implementation Activity | Resource Assigned | Date Due | Dependencies | Status | Comments |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  | **Choose a status** |  |
|  |  |  |  | **Choose a status** |  |
|  |  |  |  | **Choose a status** |  |

#### Project Deliverable Signoff

<For each project deliverable, obtain signoff below. Please review the Project Closure template for a more detailed approach to deliverable acceptance.>

| Deliverable | Signoff/Acceptance | Notes |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |