

Document 4:
Project Quarterly Progress and Exception Report

Project Title:					
Project Description:					
Project Reference Code:					
Project Geography:					
<input type="checkbox"/> All HEE South <input type="checkbox"/> Kent Surrey and Sussex <input checked="" type="checkbox"/> South West <input type="checkbox"/> Thames Valley <input type="checkbox"/> Wessex <input type="checkbox"/> STP/LWAB area - Please Specify: <input type="checkbox"/> CEPNs area - Please Specify:					
Project Manager / Organisation / Contact Details:					
Name:					
Organisation:					
Address:					
Email:					
Telephone Number:					
HEE Project Lead (South):					
Reporting Period: Select RAG					
Project Total Cost: £					
Funding year: Select funding year					
Project Lifecycle start-end dates:					
Start Date:	Select date	End Date:	Select date	Revised Date:	End Select date
Date submitted: Select date					
Previous quarter RAG:	Select RAG	Current RAG:	Select RAG	Next quarter RAG:	Select RAG

Red/Amber/Green (RAG) status matrix	
Red	Off track – significant areas of concern Project is at risk of failure; there are major issues which are unlikely to be resolved within the time (or resources) available – Exception Report in Section 4 required and signed by HEE SRO
Amber	Off track – some significant areas of concern

Unless otherwise agreed this document will need to be completed by the Project Manager in conjunction with HEE Project Lead and the Performance and Project Management Office (PPMO) PPMO.South@hee.nhs.uk

	Project is feasible, but there are risks and/or issues which must be mitigated or resolved in order to return activity back on track – Exception Report in Section 4 required and signed by HEE SRO
Green	On track - no significant areas of concern Project is on track and achievable; there are no outstanding risks/issues which need resolution.
Black	Project Closed/Completed – Final Report required

Section 1: Progress to date - Where is this project up to? Is the project on Track? What has been delivered so far? Please include clear reasons for RED or AMBER rating.



<https://chdredcaplive.bris.ac.uk/redcap/surveys/> Feedback survey code: 4CRCAXTNJ

Section 2: Project Plan and Activity Progress – Please summarise what milestones from the original plan have been achieved for this reporting period

Milestones:	Start Date:	End Date:	Progress:	Allocated (£)	Spent (£)	Variance (£)
1.	Select date	Select date	Select Status			
2.	Select date	Select date	Select Status			
3.	Select date	Select date	Select Status			
4.	Select date	Select date	Select Status			

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5.		Select date	Select date	Select Status			
6.		Select date	Select date	Select Status			
Totals (£):							

Section 3: Benefits realisation – Are there any specific benefits realised or new ones identified for this reporting period?							
	Description	Measure Description	Monitoring Methodology	Baseline	Projected Outcome	Actual Outcome	Variance
1.							
2.							

Section 4: Risk plan review – Are there any new risks or changes in the severity and likelihood of the risks identified in the original plan? Please provide brief details of any risks to the success of the project and how these will be mitigated.				
Risks and Challenges:		Severity	Likelihood	Mitigating action:
		Select Severity	Select likelihood	
		Select Severity	Select likelihood	

Section 5: Exception report – please <u>only</u> complete this section if you have an overall project RAG status of Amber or Red			
5a. What was/were the issues/reasons why your project has gone off track and what is the impact?			
5b. Action plan to return activity to being on track:			
Issue	Remedial Action	Anticipated Completion	Progress
		Select date	Select Status
		Select date	Select Status

PPMO Contact:			
Project Lead:		Date:	Select date
Approved by (HEE Lead):		Date:	Select date
HEE SRO (South) or Senior Manager Signature (if RED or AMBER)		Date:	Select date

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