PROJECT DASHBOARD PRACTICE GUIDE

MARCH 31, 2011

PRACTICES GUIDE PM DASHBOARD - DASHBOARD P1 P2 WORKSHEETS

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Overview

The 'Dashboard p1' and 'Dashboard p2' worksheets are the primary scorecards used for executive decision making at project reviews. They use a combination of manual entry fields and data reference fields to provide the ratings and information displayed in each section. This document will discuss each worksheet, the subsequent sections, and give examples of a completed worksheet by section.

Note: Extreme caution should be taken not to overwrite fields that contain formulas or data references to other worksheets as this will cause unintended and inaccurate results. If this occurs contact the Enterprise Portfolio Manager to correct the error.

Dashboard p1 Worksheet

The 'Dashboard p1' worksheet is a summary level scorecard containing five sections that provide executive level information related to the health and status of the project. The accuracy and consistency of this data is extremely important. If the data is incorrect or missing there is an impact to the determination of project health and executive decision making.

General Information Section

This section provides general information about the project.

General Information Data Fields

The following table describes the fields required in the General Information Section of the 'Dashboard p1' worksheet.

Fields	Mode of Entry	Description
Agency Name	Manual	The name of the agency owning the project
Panel Review Meeting Date	Manual	The date of the upcoming GTA Review meeting
Project Name	Manual	The official name of the project
Project Status "As Of" Date	Manual	The reporting date as published on the Enterprise Critical Projects Meeting Schedule
Original Project Budget	Manual-one time	The budget as initially approved. This amount should not change over time
Current Project Budget	Manual	The current project budget as of the reporting date
Project Start Date	Manual	The date the agency initiated project related work effort
Project End Date	Manual	The expected completion date of the project
Build Certificate Awarded	Drop-down	Options include: blank/Yes/No This field indicates if the project has passed the Investment Management stage gate and has been authorized to proceed into the Build Phase of the EPLC process.

The diagram below depicts an example of data contained in the *General Information Section*.

GENERAL INFORMATION:	
Agency Name:	Agency 1
Panel Review Meeting Date:	15-Nov-10
Project Name:	Project Example 1
Project Status "As Of" Date:	30-Nov-10
Original Project Budget:	$5,000,000
Current Project Budget:	$5,000,000
Project Start Date:	1-Jul-10
Project End Date:	30-Jun-12
Build Certificate Awarded:	Yes

Project Health Rating Section

This section denotes the overall health rating of the project from the perspective of the dashboard score and GTA. The dashboard score is a weighted rating based on scores from the detailed worksheets. The weightings will be explained in the Project Health Indicators section below. The project manager is expected to enter comments relating to items or issues that are impacting the ability of the project to achieve its objectives and briefly comment on accomplishments or major milestones achieved.

Health Rating Data Fields

The following table describes the data fields in the Project Health Rating section.

Area/Fields	Mode of Entry	Description
Agency		This area contains the health rating determined by dashboard calculations
Previous	Manual	The project manager should enter the health rating from the 'Current' section of the previous months dashboard
Current	Referenced	This is referenced from cell BF19 on the 'Dashboard p1' worksheet. An explanation of this rating is given below
GTA		This area contains the health rating determined by GTA and is entered manually
Previous	Manual	Entered by the Enterprise Portfolio Manager at GTA
Current	Manual	Entered by the Enterprise Portfolio Manager at GTA
Comments	Manual	The purpose of this section is to give a synopsis of the projects ability to fulfill its objectives as of the reporting date regarding the schedule, budget, risk, and issues. Major accomplishments for the reporting period may also be highlighted.

The diagram below depicts an example of data contained in the *Project Health Rating Section*.

PROJECT HEALTH RATING			
Agency		GTA	
Previous	Current	Previous	Current
N/A	Green	N/A	Green
Comments:			

Project Description Section

This section contains a brief description of the project including its scope, objectives, and expected outcomes.

PROJECT DESCRIPTION

Project Status Indicators Section

This section depicts the status indicators for the six categories determining overall project health. The diagram below displays each category with sample scores. Each category will be explained in the following sections below.

First, an explanation of the scoring of the overall health status will be given. Each category is scored from the individual detailed worksheet, i.e. Schedule health is derived from the score of the Schedule Detail worksheet. This score is translated to the stop light score of Green-Yellow-Red as displayed in the Health Indicator section. This value is then used to determine the total score of the overall health calculation. As depicted in the table below, the Schedule health is 'Green' which gives it a value of 3. The weighting assigned to the Schedule category is 25, therefore the contribution of the Schedule score to Project Overall Health is 75 (3 times 25). Each category is scored in this manner. These scores are then totaled to give an overall contribution score (Score). This total contribution is then divided by 300 to determine the health ratio and subsequent Green-Yellow-Red rating. As you can see in the diagram below each health category is weighted differently. These weights were determined by the GTA Enterprise Program Management Office and approved by the Enterprise Critical Projects Panel. The sum of the weights equals 100. In our example you may think of Schedule as having a 25% contribution to the overall health score of the project, whereas Business Objectives contributes only 5% to the overall health of the project. As you can see, if you do not do as well in Business Objectives the overall health is not as affected compared to doing poorly in Schedule.

PROJECT STATUS INDICATORS																			
SCHEDULE			BUDGET			BUSINESS OBJECTIVES			RISK			ISSUES			ORG. READINESS		
Previous	Current	SPI	Previous	Current	Trend	Previous	Current	Score	Previous	Current	Score	Previous	Current	Trend	Previous	Current	Trend
N/A	Green	1.00	N/A	Green	N/C	N/A	Green	1.00	N/A	Green	0.67	N/A	Green	N/C	N/A	Green	N/C
Comments:			Comments:			Comments:			Comments:			Comments:			Comments:		

Project Health Calcuations:

Values:	Green	3
	Yellow	2
	Red	1

	Schedule	Budget	BO	Risk	Issues	OR	Totals	
Weight	25	25	5	20	15	10	300	
Score	75	75	15	60	45	30	300	
			Project Health Indicator				1.00	**Green**

Schedule Health Indicator

The Schedule Health Indicator is comprised of 4 fields. The 'Current' indicator and 'SPI' indicator are referenced from the health calculations from the Schedule Detail worksheet which are explained in the Schedule worksheet practices guide. The 'Previous' field should be maintained by the project manager and contains the status indicator from the previous reporting period. The 'Comments' section is free form text entered by the project manager. This section should describe the overall status of the schedule, any issues causing slippage, or accomplishments achieved.

Budget Health Indicator

The Budget Health Indicator is comprised of 4 fields. The 'Current' indicator is referenced from the health calculations from the Budget Detail worksheet which is explained in the Budget worksheet practices guide. The 'Trend' field is maintained by the project manager and depicts if the category is trending to the good, bad, or no change. To update the field over write by keying a single quote (') followed by '+' or '-'. If there is no change, key in N/C. The 'Previous' field should be maintained by the project manager and contains the status indicator from the previous reporting period. The 'Comments' section is free form text entered by the project manager. This section should describe the overall status of the budget or any issues causing changes to the budget.

Business Objectives Health Indicator

The Business Objectives Health Indicator is comprised of 4 fields. The 'Current' indicator and 'Score' indicator are referenced from the health calculations from the Business Objectives Detail worksheet which are explained in the Business Objectives worksheet practices guide. The 'Previous' field should be maintained by the project manager and contains the status indicator from the previous reporting period. The 'Comments' section is free form text entered by the project manager. This section should describe the overall status of the projects objectives, any issues in achieving them, or accomplishments achieved.

Risk Health Indicator

The Risk Health Indicator is comprised of 4 fields. The 'Current' indicator and 'Score' indicator are referenced from the health calculations from the Risk Detail worksheet which are explained in the Risk worksheet practices guide. The 'Previous' field should be maintained by the project manager and contains the status indicator from the previous reporting period. The 'Comments' section is free form text entered

by the project manager. This section should describe the overall status of the projects risks including the identification of new risks or escalations needed to mitigate a realized risk.

Issues Health Indicator

The Issues Health Indicator is comprised of 4 fields. The 'Current' indicator is referenced from the health calculations from the Issue Detail worksheet which is explained in the Issue worksheet practices guide. The 'Trend' field is maintained by the project manager and depicts if the category is trending to the good, bad, or no change. To update the field over write by keying a single quote (') followed by '+' or '-'. If there is no change, key in N/C. The 'Previous' field should be maintained by the project manager and contains the status indicator from the previous reporting period. The 'Comments' section is free form text entered by the project manager. This section should describe the overall status of project issues and status of their resolution.

Organizational Readiness Health Indicator

The Organizational Readiness Health Indicator is comprised of 4 fields. The 'Current' indicator is referenced from the health calculations from the Organizational Readiness Detail worksheet which is explained in the Organizational Readiness worksheet practices guide. The 'Trend' field is maintained by the project manager and depicts if the category is trending to the good, bad, or no change. To update the field over write by keying a single quote (') followed by '+' or '-'. If there is no change, key in N/C. The 'Previous' field should be maintained by the project manager and contains the status indicator from the previous reporting period. The 'Comments' section is free form text entered by the project manager. This section should describe the overall status of the agencies readiness to implement the project and prepare the agency for any subsequent changes.

Financials Section

The Financials section displays a snapshot of the financial health of the project and gives a comparison to the previous month. The example below depicts the project is under budget by $400,000. It was planned to have spent $500,000 but only $100,000 was actually spent. The project manager should be prepared to explain this discrepancy even though it appears to be a 'good' thing.

FINANCIALS: Previous Actuals to Date							FINANCIALS: Previous Projected	
Total Budget (State) (a)	Total Budget (Other Funds) (b)	Total Project Budget (c) (a + b)	Total Planned Expenditures (Project to Date) (d)	Total Actual Expenditures (Project to Date) (e)	Expenditure Variance ('+' = Overbudget, '-' = Underbudget) (f) (e - d)	Available Funds to Complete Project (g) (c - e)	Estimate Funds Needed to Complete Project (h)	Budget Variance (i) (g - h)
$0	$0	$0	$0	$0	$0	$0	$0	$0
FINANCIALS: Current Actuals to Date							FINANCIALS: Projected	
$5,000,000	$0	$5,000,000	$500,000	$500,000	$0	$4,500,000	$0	$4,500,000

Financial Data Fields

Please note that the Current financial amounts are referenced from the Budget Detail worksheet. The project manager should first update the previous fields by keying in the Current fields and then update the Budget Detail worksheet.

Field	Previous Current
Total Budget (State)	Manually entered by the PM. Referenced from the Budget Detail worksheet
Total Budget (Other)	Manually entered by the PM Referenced from the Budget Detail worksheet
Total Project Budget	Calculated field: State Budget + Other Budget Referenced from the Budget Detail worksheet
Total Planned Expenditures	Manually entered by the PM

	Referenced from the Budget Detail worksheet
Total Actual Expenditures	Manually entered by the PM
	Referenced from the Budget Detail worksheet
Expenditure Variance	Calculated field: Actual Expenditures – Planned Expenditures
	Referenced from the Budget Detail worksheet
Available Funds to Complete	Calculated field: Total Budget – Actual Expenditures
	Referenced from the Budget Detail worksheet
Estimated Funds to Complete	Manually entered by the PM
	Referenced from the Budget Detail worksheet
Budget Variance	Calculated field: Avail Funds to Complete – Est. Funds to Complete
	Referenced from the Budget Detail worksheet

Dashboard p2 Worksheet

This worksheet is designed to allow the project manager to provide a written status in the areas of the project not typically scored. These sections are described below.

Informational Section

This section contains multiple areas of free form text where the project manager enters vital information about the project that is not contained in the subsequent worksheets.

Data Entry Areas

Each area is described below along with any data fields contained within the area.

Area	Fields	Description
Actions		The project manager may enter action items that need to be addressed by executive leadership
Items For Discussion		This area contains items to be discussed with the review panel
Major Deliverables		The project manager should list the Major deliverables of the project here
	Deliverable Description	Briefly describe the deliverable
	Planned Finish Date	Enter the planned finish date
	Actual Finish Date	Enter the Actual finish date
	Projected Finish Date	Enter the projected finish date
	Schedule Variance (Calculated by the spreadsheet)	This is the calculated difference between the Planned finish date and either the actual or projected finish date.
Critical Issues		A list of the most important issues facing the project
	Issue Description	Briefly describe the issue
	Response Plan	Briefly describe how the issue will be resolved
	Due Date	Enter the due date for resolution
	Priority	Enter the priority as High, Medium, or Low
Critical Risks		A list of the most important risks the team is managing
	Risk Description	Briefly describe the risk
	Mitigation/Response Plan	Describe the response plan for the risk
	Probability	Enter the likelihood the risk will occur (H,M,L)
	Impact	Enter the impact to the project is the risk occurs (H,M,L)

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	Category	Enter whether the risk is a category 1, 2, or 3
Other Items to Report	Change Requests	Enter any change requests submitted since the last panel review
	Major Accomplishments	Enter any major accomplishments since the last panel review
	Planned Activities	Enter major activities planned for the coming reporting period

ACTIONS - include responses to action items assigned at previous panel review meetings (if applicable)

ITEMS FOR DISCUSSION - include significant items that the project team wants to communicate for awareness or escalate for action

MAJOR DELIVERABLES - include all major deliverables through the complete schedule. Please organize by program or sub-projects.

Deliverable Description	Planned Finish Date (a)	Actual Finish Date (if applicable) (b)	Projected Finish Date (if applicable) (c)	Schedule Variance (Business Days Ahead or Behind) (d) [a-(b or c)]
Business Requirements Document	1/31/2011	2/2/2011	2/1/2011	-2
				0
				0

CRITICAL ISSUES

Issue Description	Response Plan	Due Date	Priority (H, M, L)

CRITICAL RISKS

Risk Description	Mitigation / Response Plan (avoidance, transference, mitigation, or acceptance)	Probability (H, M, L)	Impact (H, M, L)	Category (1, 2, 3)

OTHER ITEMS TO REPORT

Change Requests - describe requests that have significant impact to project's progress and provide the impact to the project:

Major Accomplishments since previous panel review:

Planned Activities for next panel review

PRACTICES GUIDE PM DASHBOARD - SCHEDULE DETAIL WORKSHEET

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Practices Guide – Schedule Detail Worksheet

Introduction to the *Schedule Detail* Worksheet

The project schedule is the driver during the execution phase of the project. The schedule lays out the sequence and timing of the work effort the project team is to accomplish. The schedule must have a baseline from which to accurately determine the progress of the work effort. The next necessary ingredient is the recording of the actual start and finish of the work effort. Lastly, the project manager must capture the actual effort expended on the work as either a percent of work completed or the actual hours spent. These three components allow for the calculation of metrics that can guide the project team in determining if the work effort is being accomplished in the timeframes reported to the sponsor and governance bodies. These metrics can also assist the project manager in determining schedule issues so that options and alternatives can be developed to bring the work effort back to an acceptable timeline. The schedule metrics then become the guide by which the project team and governance body can determine if the project effort remains on course. Therefore there becomes a need to monitor and measure the schedule of the project.

The *Schedule Detail* worksheet contains pertinent data regarding the project schedule that allows for the objective measurement of the progress of the project work during its lifecycle. This Practices Guide will discuss the four major sections of the worksheet and explain how to complete them and evaluate the metrics as they relate to the overall health rating of the project.

The four sections cover the task schedule data, methods used to measure the progress of the work, the objective scoring of the worksheet, and the methods used to evaluate the subjective scoring of the worksheet.

Note: All project schedule references in this Practices Guide refer to Microsoft Project 2003. Other versions of Microsoft Project may perform differently and should be noted by the reader.

Explanation of the *Schedule Detail* Task Schedule Data Fields

This section explains the task schedule data fields for the project work effort and the valid data that should be keyed into each field. These fields are used to evaluate and measure the health of the schedule and are required entry fields. All of this data can be exported from Microsoft Project and is explained in Appendix A and Appendix B.

Schedule Tracking Data

Each task in the project is required to contain a baseline start date, baseline finish date, actual start date, and actual finish date. These dates in combination with the dashboard ‘As-of-Date’ are used to help the project manager and governance body understand the progress of the work effort and the overall health of the project.

The following table identifies and describes each field and discusses the valid data to be entered.

Field Name	Description
Task ID	This is the name of the task as denoted by the Name field in MS Project. Text data is valid for this field.
Planned/Baselined Start Date	This is the Baseline Start Date from MS Project.
Actual Start Date	This is the Actual Start Date from MS Project.
Planned/Baselined Completion Date	This is the Baseline Finish Date from MS Project.
Actual Completion Date	This is the Actual Finish Date from MS Project.

An example of this data is displayed below.

Pasted Fields				
Task ID	Planned/ Baseline Start Date	Actual Start Date	Planned/ Baseline Completion Date	Actual Completion Date
	10/5/2010	10/5/2010	4/11/2011	11/15/2010
Task 1	10/5/2010	10/5/2010	10/11/2010	10/11/2010
Task 2	10/12/2010	10/12/2010	10/25/2010	10/25/2010
Task 3	10/26/2010	10/26/2010	11/15/2010	11/15/2010
Task 4	11/16/2010	11/16/2010	11/22/2010	
Task 5	11/23/2010	11/23/2010	12/13/2010	
Task 6	12/14/2010		12/27/2010	
Task 7	12/28/2010		1/3/2011	
Task 8	1/4/2011		1/17/2011	
Task 9	1/18/2011		1/24/2011	
Task 10	1/25/2011		2/7/2011	
Task 11	2/8/2011		2/14/2011	
Task 12	2/15/2011		2/28/2011	
Task 13	3/1/2011		3/21/2011	
Task 14	3/22/2011		4/4/2011	
Task 15	4/5/2011		4/11/2011	

Calculated Fields

All of these fields are calculations based on the task data supplied from MS Project and should not be altered. These are used to assist the project manager track and measure the work progress of the project. The table below describes each field and how it is used. The metrics derived from this section is used in the objective scoring of the schedule and is explained in a section later in this document.

Field Name	Description
Total Tasks	The detail field validates that the Task ID field contains data. If it does a 1 is placed in the field. The total field accumulates the detail fields to give a total number of tasks in the schedule
Started as Planned	The detail field verifies that the Baseline Start Date is equal to the Actual Start Date. If it is a 1 is placed in the field. The total field accumulates the detail fields giving you the total number of tasks that started as they were planned to start.
Started w/in 1 week as Planned	The detail field verifies that the Actual Start Date of the task is within 7 calendar days of the Baseline Start Date. The total field accumulates the detail fields giving you the number of tasks that started at least within 7 calendar days of when they were

Field Name	Description
	planned to start.
Completed as Planned	The detail field verifies that the Baseline Finish Date is equal to the Actual Finish Date. If it is a 1 is placed in the field. The total field accumulates the detail fields giving you the total number of tasks that completed as they were planned to complete.
Completed w/in 1 week as Planned	The detail field verifies that the Actual Finish Date of the task is within 7 calendar days of the Baseline Finish Date. The total field accumulates the detail fields giving you the number of tasks that completed at least within 7 calendar days of when they were planned to complete.
Planned to Start w/in Period	The detail field verifies that the Baseline Start Date is less than or equal to the Dashboard As-Of-Date. If it is a 1 is placed in the field. The total field accumulates the detail fields giving you the number of tasks that are planned to start on or before the Dashboard As-Of-Date.
Planned to Complete w/in Period	The detail field verifies that the Baseline Finish Date is less than or equal to the Dashboard As-Of-Date. If it is a 1 is placed in the field. The total field accumulates the detail fields giving you the number of tasks that are planned to complete on or before the Dashboard As-Of-Date.

An example of this data is displayed below.

Pasted Fields					Calculated Fields						
Task ID	Planned/ Baseline Start Date	Actual Start Date	Planned/ Baseline Completion Date	Actual Completion Date	Total Tasks	Started as Planned	Started within 1 week as planned	Completed as Planned	Completed within 1 week as planned	Planned to Start within Period	Plan to Complete within Period
	10/5/2010	10/5/2010	4/11/2011	11/15/2010	15	5	0	3	0	5	4
Task 1	10/5/2010	10/5/2010	10/11/2010	10/11/2010	1	1	0	1	0	1	1
Task 2	10/12/2010	10/12/2010	10/25/2010	10/25/2010	1	1	0	1	0	1	1
Task 3	10/26/2010	10/26/2010	11/15/2010	11/15/2010	1	1	0	1	0	1	1
Task 4	11/16/2010	11/16/2010	11/22/2010		1	1	0	0	0	1	1
Task 5	11/23/2010	11/23/2010	12/13/2010		1	1	0	0	0	1	0
Task 6	12/14/2010		12/27/2010		1	0	0	0	0	0	0
Task 7	12/28/2010		1/3/2011		1	0	0	0	0	0	0
Task 8	1/4/2011		1/17/2011		1	0	0	0	0	0	0
Task 9	1/18/2011		1/24/2011		1	0	0	0	0	0	0
Task 10	1/25/2011		2/7/2011		1	0	0	0	0	0	0
Task 11	2/8/2011		2/14/2011		1	0	0	0	0	0	0
Task 12	2/15/2011		2/28/2011		1	0	0	0	0	0	0
Task 13	3/1/2011		3/21/2011		1	0	0	0	0	0	0
Task 14	3/22/2011		4/4/2011		1	0	0	0	0	0	0
Task 15	4/5/2011		4/11/2011		1	0	0	0	0	0	0

Earned Value Fields

These fields are a combination of data exported from MS Project and calculated fields and should not be altered. These are used to determine the Schedule Performance Index (SPI) for each task and the overall project. The SPI derived from this section is displayed in the Schedule Health Indicator section on the Dashbaord p1 worksheet and is explained in a section later in this document. The table below describes each field and how it is used.

Field Name	Description
Pct Work Complete	This is the percent of the work complete and is exported from the MS Project schedule.
Baseline Effort	This field is the planned work effort in hours. It is exported from the MS Project schedule. It is used in combination with the Pct Work Complete to calculate the EV (Earned Value) field below.
Duration (Wrk Days)	This field is a calculated field that determines the number of work days between the Baseline Start Date and the Baseline Finish Date.

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Field Name	Description
Duration Days Used	This field is a calculated field that determines the number of work days between the Baseline Start Date and the Dashboard As-Of-Date.
PV	This is a calculated field that uses the Duration and Duration Days Used to determine a percentage of planned time and multiples that percentage by the Baseline Effort. The resulting number is the amount of work that is planned to be complete as of the As-Of-Date. This is also referred to as the Planned Value (PV).
EV	This is a calculated field that multiples the Pct Work Complete by the Baseline Effort. The resulting number is the amount of planned work that is actually completed as of the As-Of-Date. This is also referred to as the Earned Value (EV).
SPI	This is a calculated field that divides the EV by the PV. The resulting index indicates the schedule performance of the project. If the number is 1 the project is on schedule, all the work that was planned to be done was done. If the number is less than one the project is behind schedule, less work that was planned to be done actually got done. If the number is greater than one the project is ahead of schedule, more work that was planned to be done actually got done.
To-Complete Performance Index	This is a calculated field. The inverse of the SPI is calculated. This number is used as a forecast to determine an approximate completion of the project if the current performance is maintained.
Additional Duration to Complete	The To-Complete Performance Index is multiplied by the project duration to give the additional days needed to complete the project. A negative number means the project may complete that many days sooner.

An example of this data is displayed below.

Earned Value Calculations								
Pct Work Complete	Baseline Effort (hrs or $)	Duration (Wrk Days)	Duration Days Used	PV	EV	SPI	To-Complete Performance Index	Additional Duration To Complete
30%	**1080**	**135**	**41**	**328**	**350**	**1.07**	**0.94**	**-8.49**
100%	40.00	5	5	40	40	1.00		
100%	80.00	10	10	80	80	1.00		
100%	120.00	15	15	120	120	1.00		
95%	40.00	5	5	40	38	0.95		
60%	120.00	15	6	48	72	1.50		
0%	80.00	10	0	0	0			
0%	40.00	5	0	0	0			
0%	80.00	10	0	0	0			
0%	40.00	5	0	0	0			
0%	80.00	10	0	0	0			
0%	40.00	5	0	0	0			
0%	80.00	10	0	0	0			
0%	120.00	15	0	0	0			
0%	80.00	10	0	0	0			
0%	40.00	5	0	0	0			

Objective Scoring of the *Schedule Detail* Worksheet

The Schedule Detail worksheet is measured and given a health rating based upon several criteria described in the list below. The metrics are derived from the data exported from the MS Project schedule and uses the start and finish dates for Baseline and Actual dates as compared to the

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Dashboard As-Of-Date. The sequences below describe each metric and how it contributes to the overall objective score for the schedule. The data from the table will be used to illustrate the calculations used for scoring.

1. Number of tasks planned to be completed or started within reporting period:
    a. **Started1:** The total of all tasks that have a Baseline Start Date that is less than or equal to the Dashboard As-Of-Date. **Value: 5**
    b. **Completed1:** The total of all tasks that have a Baseline Finish Date that is less than or equal to the Dashboard As-Of-Date. **Value: 4**
    c. **Score1:** (Started1 + Completed1). **Value: 5 + 4 = 9**
2. Number of tasks completed or started as planned:
    a. **Started2:** The total of all tasks that have a Baseline Start Date that is equal to the Actual Start Date. **Value: 5**
    b. **Completed2:** The total of all tasks that have a Baseline Finish Date that is equal to the Actual Finish Date. **Value: 3**
    c. **Score2:** (Started2 + Completed2) / (Score1). **Value: (5 + 3)/9 = 0.89**
3. Number of tasks completed or started as planned or no later than within a week as planned:
    a. **Started3:** The sum of all tasks that have a Baseline Start Date that is less than or equal to the Dashboard As-Of-Date and the Actual Start Date is 7 calendar days less than or equal to the Baseline Start Date. **Value: 5**
    b. **Completed3:** The sum of all tasks that have a Baseline Finish Date that is less than or equal to the Dashboard As-Of-Date and the Actual Finish Date is 7 calendar days less than or equal to the Baseline Finish Date. **Value: 3**
    c. **Score3:** (Started3 + Completed3) / (Score1). **Value: (5 + 3)/9 = 0.89**
4. Number of tasks not completed or started within a week of planned:
    a. **Started4:** The difference between the tasks started within plan and the tasks started within 7 calendar days of plan. **Value: 5 - 5 = 0**
    b. **Completed4:** The difference between the tasks finished within plan and the tasks finished within 7 days of plan. **Value: 4 - 3 = 1**
    c. **Score4:** (Started4 + Completed4) / (Score1). **Value: (0 + 1)/9 = 0.11**
5. Total Score
    a. If Score2 (0.89) > 0.90 (TRUE) then, **Total Score** = Score1 (0.89), else
    b. If Score3 >= 0.80 then, **Total Score** = Score3 else
    c. **Total Score** = 0.70

The table below is the result of the example data used in this guide.

Enter results or automatically calculate from report below:	Started	Completed	**Total / Greater Variance /**
Number of tasks planned to be completed or started within reporting period:	5	4	9
Number of tasks completed or started as planned:	5	3	0.89
Number of tasks completed or started as planned or no later than within a week as planned:	5	3	0.89
Number of tasks not completed or started within a week of planned:	0	1	0.11
			88.89%

Practices Guide – Schedule Detail Worksheet

Subjective Scoring of the *Schedule Detail* Worksheet

As in each of the worksheets in the PM Dashboard, the Schedule Detail worksheet has a subjective scoring section. This allows the project manager to raise or lower the overall health score by identifying compliance to two items.

The first item is the assertion by the project manager that the project will be able to complete ahead of schedule or on-time.

The second item is the project manager's assertion that the project is adequately staffed to complete the project. The subjective scoring section is depicted in the diagram below.

The subjective scoring section works in the following manner. The Total Score, calculated in the previous section, is used as a base for the Subjective Scoring. To decrease a subjective score place an 'x' in the "Lower Objective" field. This will decrease the score by 0.20 points. Do the same to the "Raise Objective" field to increase the subjective score by 0.20 points. Also, make sure you delete the 'x' from the field you are not using. To drive the subjective score to "Red" you can blank out all the subjective scoring fields.

Schedule Scoring **Project Name:** **Project Example 1**

Please only fill-in cells highlighted in ORANGE.

Scored items: Please put an "X" below the response that best describes your answer. Please mark only ONE ANSWER per question.

1) Project completion date verification: The project will be completed ahead of schedule or on-time?

Lower Objective	Keep Objective	Raise Objective	Score
	x		0.89

2) Resource leveling & availability: The project is appropriately staffed and all needed resources are available?

Lower Objective	Keep Objective	Raise Objective	Score
	x		0.89

Please check this box if the schedule is Baselined and Approved:	x

Overall Scoring of the *Schedule Detail* Worksheet

The Total Overall score for the Schedule Detail worksheet used on the dashboard is derived by taking the average of the Objective Score and the Subjective Score i.e. ((Subjective Score + Objective Score) / 2).

The Objective Score is calculated as:

1. If the schedule baselined indicator box is filled with an 'x' the Objective Score is the calculated Overall Score,
2. Else the Objective Score equals the Overall Score minus 0.11.

The Subjective Score is the average of the two subjective scores from the previous section.

The Total Overall score is referenced by the Schedule Health Indicator section on the 'Dashboard p1' worksheet to be the Current Health Rating. The diagram below illustrates this score.

Summary of Schedule Score:	
Subjective score summary:	100.00%
Objective score summary:	100.00%
Total Overall Score:	100.00%

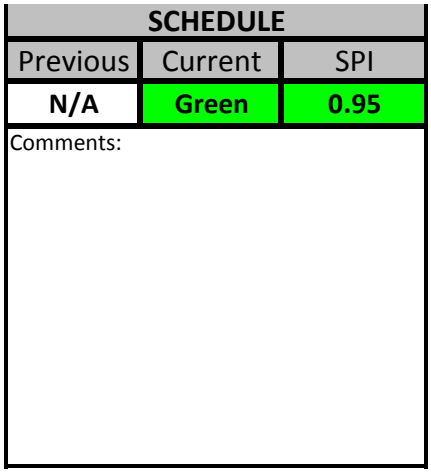
Explanation of the Schedule Dashboard Health Indicator Section

The Schedule Health Indicator section is located on the Dashboard page 1 worksheet. It contains two sections, the first is the health score, the second is the comments section.

The health score section is divided into three areas; the Previous Health rating, the Current health rating, and the Schedule Performance Index (SPI). The Previous health rating is controlled by the project manager and should be updated before updating the Schedule Details worksheet by keying in the health indicator of the Current section (Green, Yellow, or Red). The Current health rating is determined by the overall health score from the Schedule Details worksheet. If that score is less than .80 the field is filled in red and the word "Red" appears in the field. If the value is between .80 and .89 the indicator is "Yellow", and if the value is .90 or higher the indicator is "Green". The SPI section is the Schedule Performance Index (SPI) referenced from the Schedule Details worksheet and indicates the ratio of Earned Value to Planned Value. A number less than one indicates behind schedule, one indicates on schedule, and greater than one indicates ahead of schedule. A table is provided below to give an understanding of the scoring in relation to the stop-light indicators.

The Comments area of the Health Indicator section is free form text to be updated by the project manager. The words "Comments" can be overwritten if desired. This area is where the project manager should comment on any risks or issues related to the schedule. This could include things like the anticipated change of scope, issues related to project effort that may impact the delivery of scope, some internal or external factor that might impact the schedule. This area is meant to be brief and factual, discussing items that the governance body will need to know.

The Schedule Health Indicator Section of the dashboard is depicted in the diagram below.



Green	(0.90 - 1.00)
Yellow	(0.80 - 0.89)
Red	(0.00 - 0.80)

Appendix A – Developing the Dashboard Data in MS Project

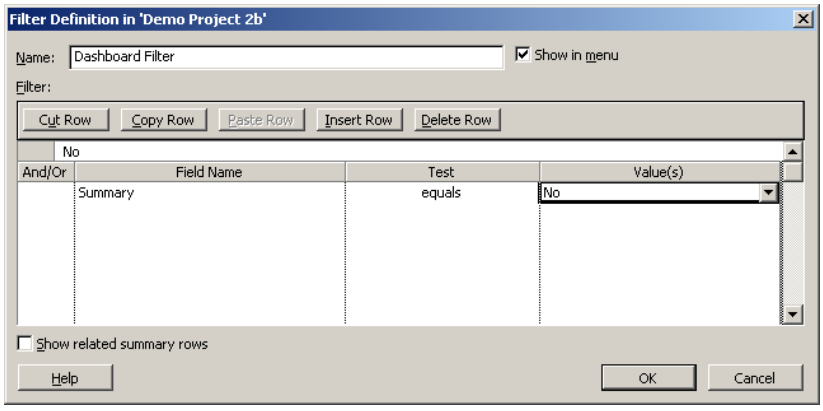
The items discussed in this appendix are one-time set up activities in MS Project.

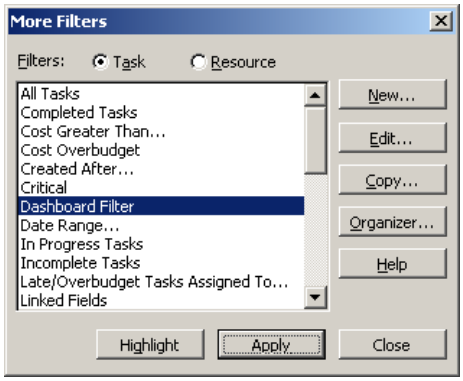
Creating the Dashboard Filter

In order to capture the lowest level tasks in the schedule and correctly map this data to the PM Dashboard you should only export non-summary level tasks. A filter will be created that will accommodate this and will be used in the Dashboard View and export which are described below.

Follow these steps to create a filter that will only display the lowest level tasks (non-summary level) of the schedule.

1. From the Menu bar, select Project, Filtered for:, More Filters
2. The More Filters list box will appear, select Task as the filter type
3. From the More Filters list box select New
4. The Filter definition box will appear, fill in the fields as such
    a. Name: Dashboard Filter, check the Show in Menu check box
    b. Place the cursor in the Field Name column, type in Summary, click cursor into the Test Column
    c. From the drop-down list, select equals, click cursor into the Values column
    d. Type in the word No
    e. Make sure the Show related Summary rows check box is clear
    f. Click the OK button
5. The More Filters list box will be highlighted, select the Apply button

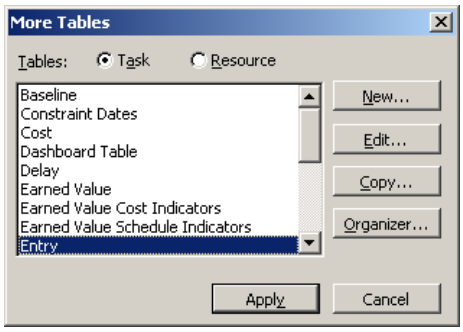




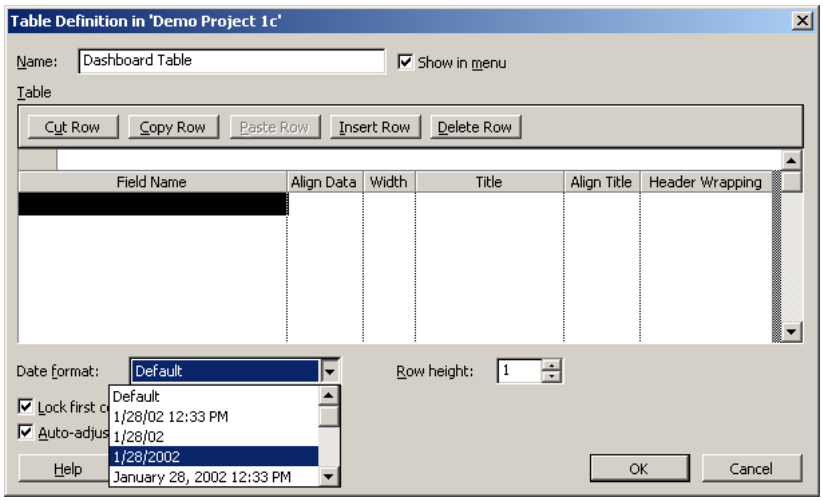
The schedule view will now display with only the lower level tasks. You may change the filter back to All Tasks if desired.

Creating the Dashboard Table to be Used in the Dashboard View

Click on the View Menu option, select the Tables option and then the More Tables option. The Tables list will appear.



Click the 'Task' option next to Tables then, click the new button to create the table.



The Table Definition screen allows you to describe the table and select MS project data elements to display in the table. The following data should be entered to define the Dashboard Table.

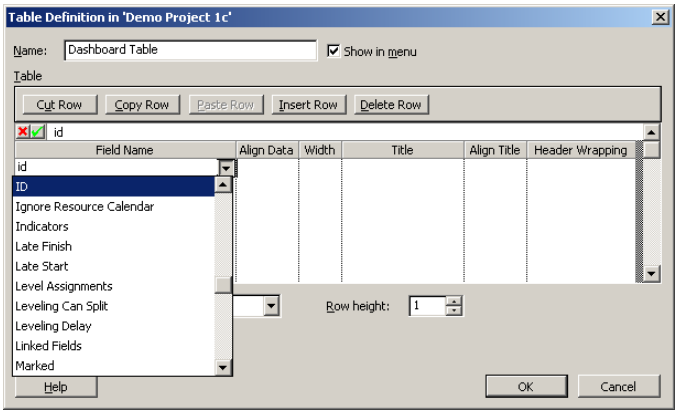
- Name: Dashboard Table
- Show in Menu: select this option
- Date Format: Select the m/dd/yyyy format
- Lock first column: select this option
- Auto-adjust header row heights: select this option

Selecting data elements

- Place the cursor in the first row of the Field Name column and select the drop down list. Key in the first letter of the data element to select
- Place the cursor over the data element you want so that it is highlighted and click on the name.
- Click on the next row and repeat until you have selected all of the data elements for the table.
- The following data elements are required to build the Dashboard Table
    - ID
    - Name

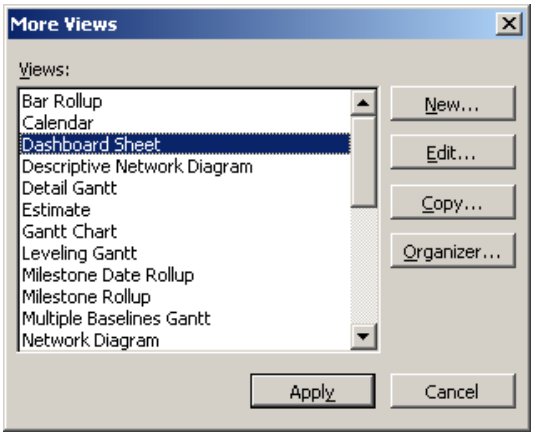
- Baseline Start
- Actual Start
- Baseline Finish
- Actual Finish
- % Work Complete
- Baseline Work
- Summary

- After building the table click the Ok button to return to the More Tables list
- On the More Tables list click the Apply button

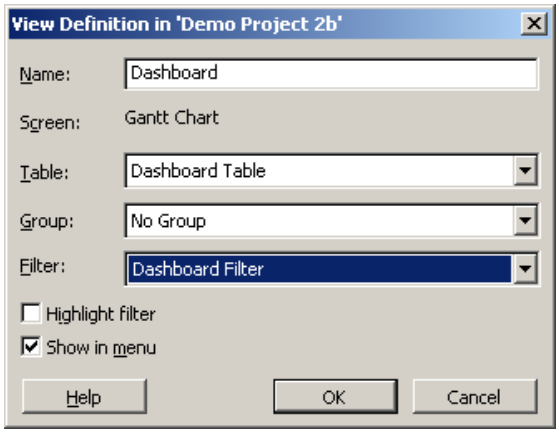


Creating the Dashboard View

Click on the View Menu option, select the Views option and then the More Views option. The Views list will appear.



Click the New button to create the view. Select 'Single view' option and click the Ok button.



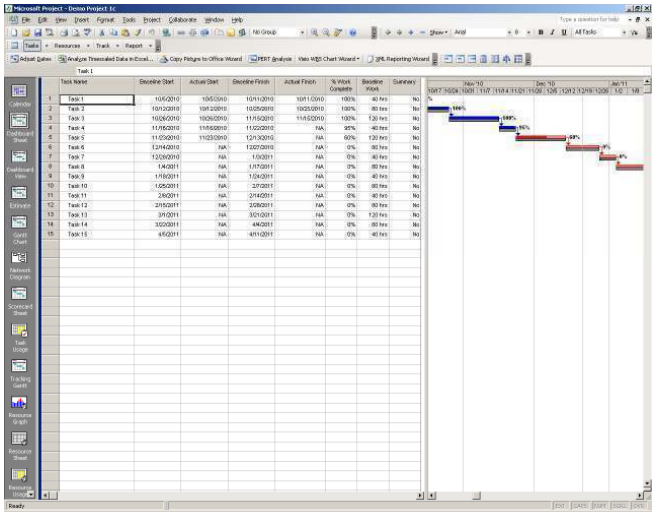
Complete the View Definition fields with the following information

1. Name: Dashboard View
2. Table: the name of the table you created for the dashboard information you will be exporting
3. Filter: name of the filter you created
4. Check the Show in menu check box
5. Click the OK box to return to the More Views list. From the More Views box click the Apply button to complete the View creation.

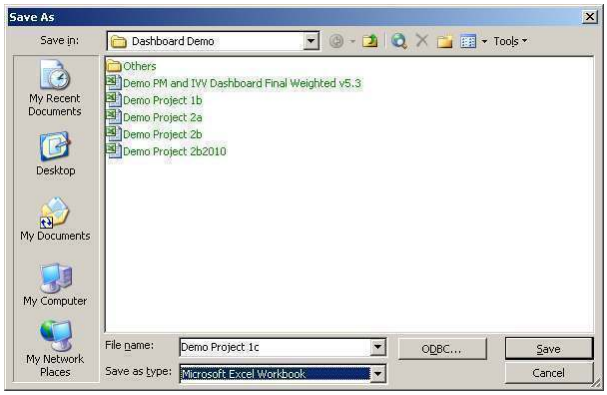
Appendix B - Exporting the Dashboard Data

Using the MS Project Export Map

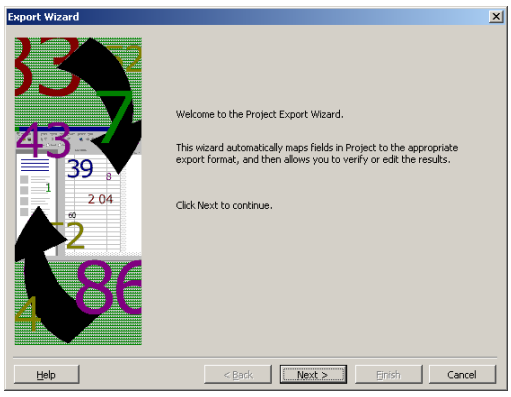
The items in this appendix may be executed when desired. Start by selecting the Dashboard View from the menu.



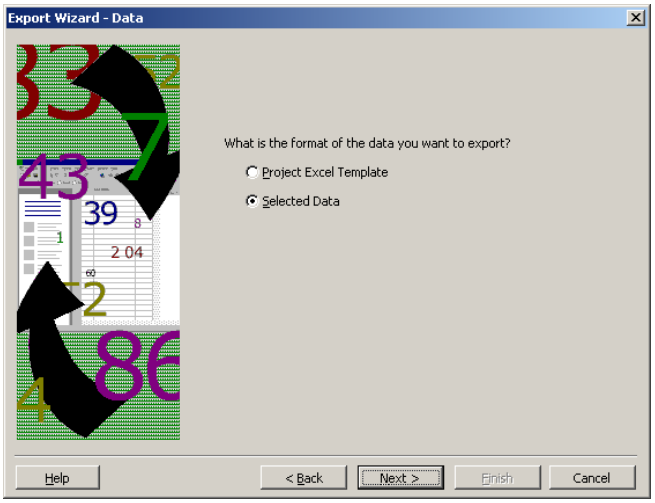
1. From the Dashboard View select the File menu then, select the Save As option
2. From the Save As dialog box select the Microsoft Excel Workbook option from the 'Save as type' drop down list. Click the Save button.



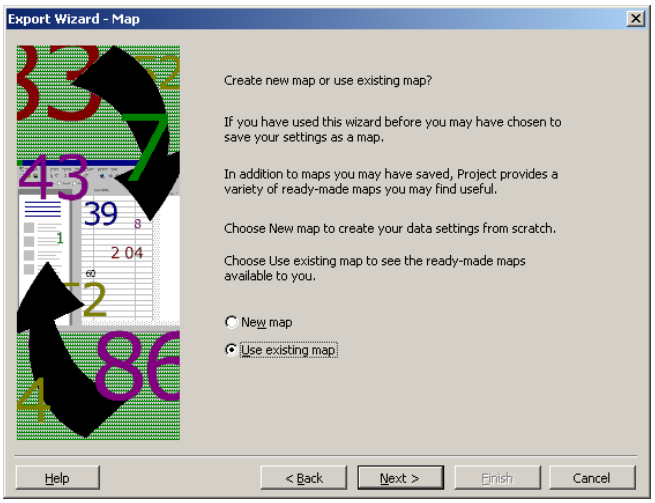
3. The Export Wizard will display. Click the Next button.



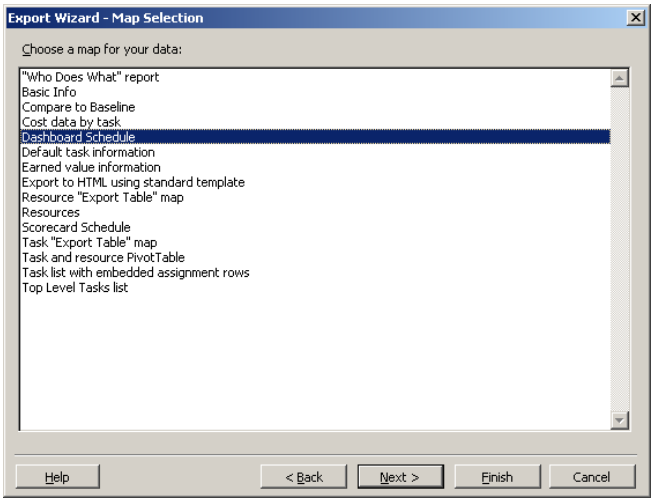
4. Click the Selected Data option and click the Next button.



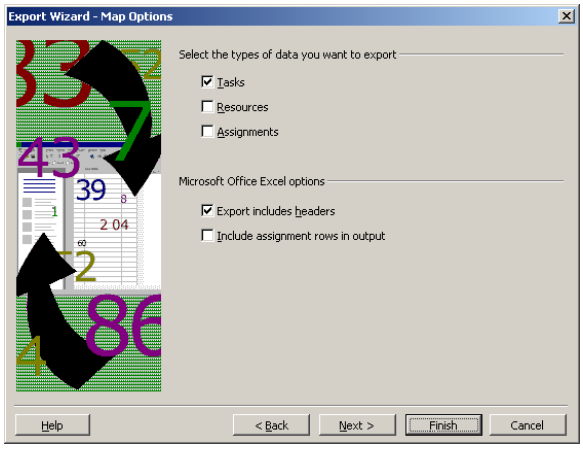
5. Select the Use existing map option and click the Next button.

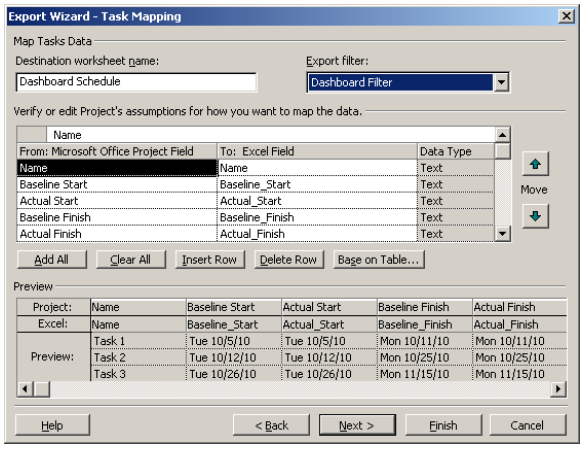


6. Select the Dashboard Schedule map and click the Next button.

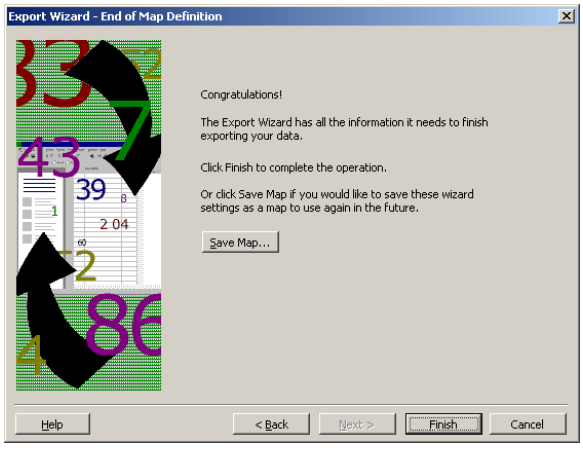


7. Select the Tasks option under 'Select the types of data you want to export'
8. Select the Export includes headers option under 'Microsoft Excel options'
9. Click the Next button or the Finish button if you do not need to change the map or view the data.





10. You may change the export map at this point.
11. After you have updated the export map click the Next button to save the map or the Finish button to export the data without saving the map.
12. To save the map Click the Save button otherwise click the Finish button.



13. Close the MS Project schedule.

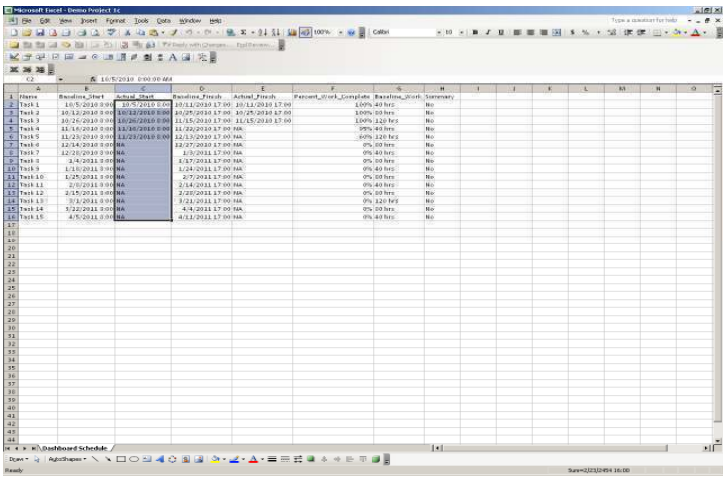
Practices Guide – Schedule Detail Worksheet

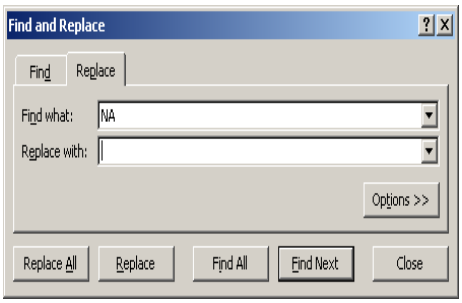
Formatting the Exported MS Project Data

<u>Open the Excel workbook you just exported.</u>

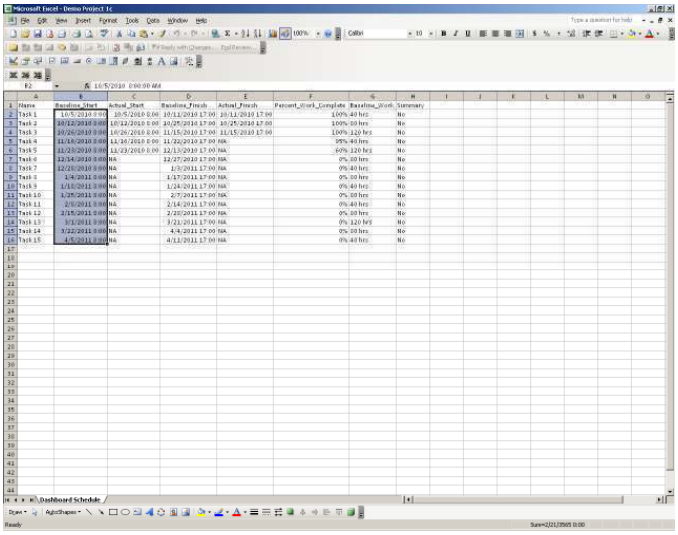
The diagrams below depict the steps listed here

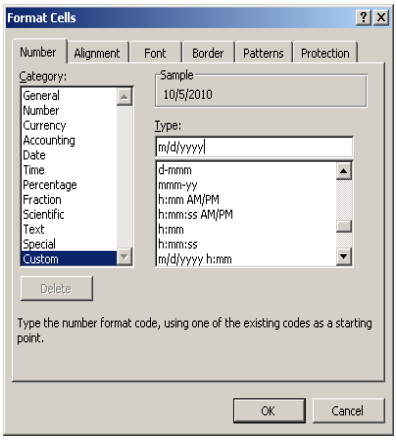
1. Edit the Date fields
    a. Find the 'NA' and replace with a blank
    b. Format remaining dates without the time
2. Edit Baseline Work column. Find 'hrs' and replace with blanks. Format the column as Number with 2 decimals

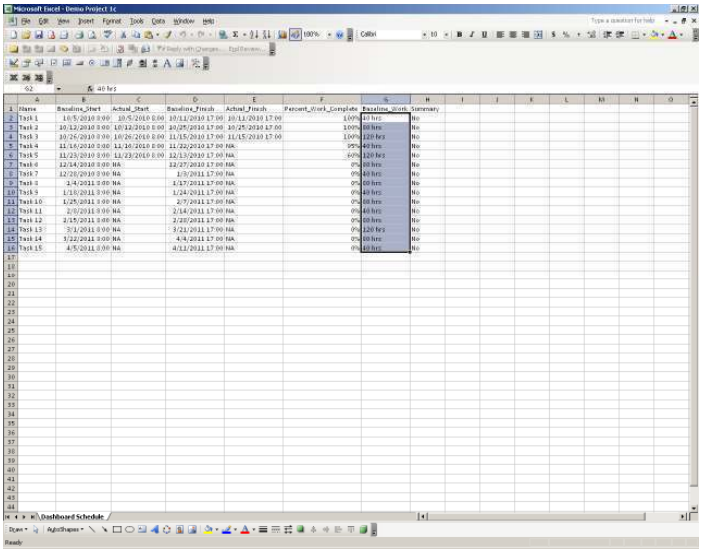




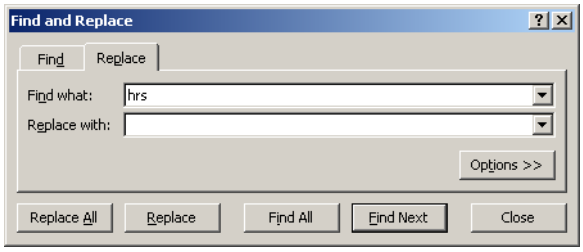
Practices Guide – Schedule Detail Worksheet

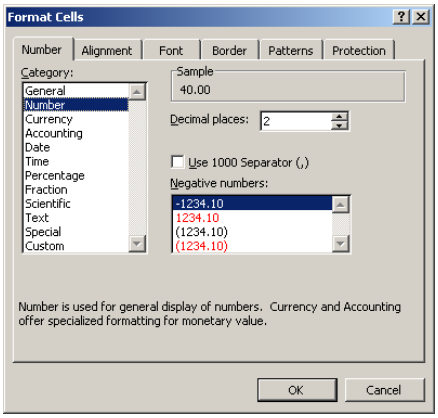






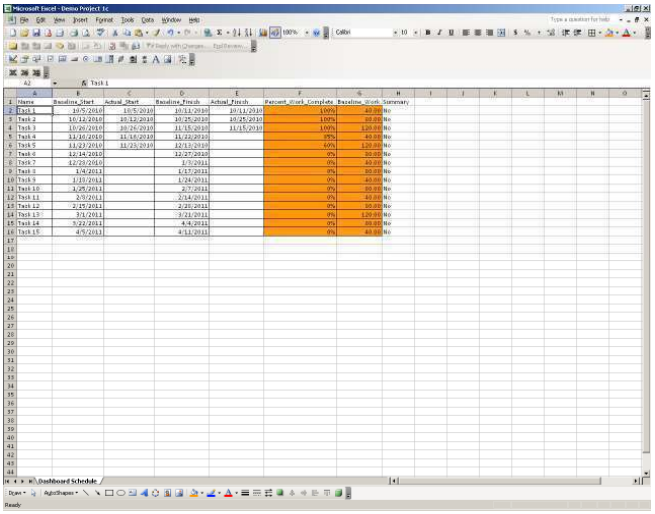
Practices Guide – Schedule Detail Worksheet





Housekeeping Items

- Select the Pct Work Complete and Baseline Work columns
- Select the Fill Color option on the Menu Bar and select Light Orange to fill in the cells
- Select all cells and place borders on the cells



You are now ready to copy the spreadsheet data to the PM Dashboard Workspace sheet.

Practices Guide – Schedule Detail Worksheet

Updating the Schedule Detail Worksheet

Copy Export Data to the Workspace worksheet

Execute the following steps to copy the data from the MS Project export worksheet to the PM Dashboard's Workspace worksheet. Make sure the PM Dashboard is open and the Workspace worksheet has been selected.

1. From the Export worksheet, select the columns Task, Baseline_Start, Actual_Start, Baseline_Finish, and Actual_Finish including the header row
2. Click the Copy icon
3. Toggle to the Workspace worksheet of the PM Dashboard
4. Place the cursor in cell A1
5. Click the Paste icon
6. Format the cells to fit the Schedule Detail worksheet (Calibri, 8)
7. Toggle back to the Export work sheet
8. Select the columns Percent_Work_Complete and Baseline_Work including the header row
9. Click the Copy icon
10. Toggle to the Workspace sheet of the PM Dashboard
11. Place the cursor in the cell to the right of the Actual_Finish column
12. Click the Paste icon
13. Format cells to fit the Schedule Detail worksheet (Calibri, 8)

After verifying that the data from the Export worksheet has been copied to the Workspace worksheet close the Exported data Excel workbook. Then, toggle to the PM Dashboard and make sure you are in the Workspace worksheet.

Copy the Workspace data to the Schedule Detail worksheet

Execute the following steps to fill in the Schedule Detail worksheet with the data from the Workspace worksheet.

1. Select the columns Task, Baseline_Start, Actual_Start, Baseline_Finish, and Actual_Finish excluding the header row
2. Click the Copy icon
3. Toggle to the Schedule Detail sheet of the PM Dashboard
4. Place the cursor in cell B30
5. Click the Paste icon
6. Validate the cell formatting (Calibri, 8)
7. Place the cursor in cell N30
8. Toggle back to the Workspace worksheet
9. Select the columns Percent_Work_Complete and Baseline_Work excluding the header row
10. Click the Copy icon
11. Toggle to the Schedule Detail sheet of the PM Dashboard
12. Place the cursor in cell N30
13. Click the Paste icon
14. Validate the cell formatting (Calibri, 8, Light Orange fill)

After filling in the Schedule Detail worksheet, validate that the data is complete and accurate. After this has been completed, the Schedule Detail worksheet is completed and the project manager may move on to completing the other dashboard worksheets or close the PM Dashboard workbook.

PRACTICES GUIDE PM DASHBOARD - BUDGET DETAIL WORKSHEET

Version Number: 1.0

Version Date: 01/01/2011

TABLE OF CONTENTS

Practices Guide – Budget Detail Worksheet

Introduction to the *Budget Detail* Worksheet

The project budget is the financial driver during the Build phase of the Enterprise Performance Lifecycle (EPLC). The budget lays out the sequence and timing for the expenditure of funds used to accomplish the work effort of the project. A cost baseline must be established to accurately determine the progress of the spending effort. These components allow for the calculation of metrics that can guide the project team in determining if the work effort is being accomplished within the cost parameters reported to the sponsor and governance bodies. These metrics can also assist the project manager in determining financial issues so that options and alternatives can be developed to bring the project back to a sound financial footing. The financial metrics then become the guide by which the project team and governance body can determine if the project effort remains on budget. Therefore there becomes a need to monitor and measure the financial data of the project.

The *Budget Detail* worksheet contains pertinent data regarding the project budget that allows for the objective measurement of the financial health of the project during its lifecycle. This Practices Guide will discuss the six major sections of the worksheet and explain how to complete them and evaluate the metrics as they relate to the overall health rating of the project.

The six sections cover the actual to-date data, projected financial data, variable values, monthly planned and actual data fields, the objective scoring of the worksheet, and the methods used to evaluate the subjective scoring of the worksheet.

Explanation of the *Budget Detail* Financial Data Fields

This section explains the financial and budget data fields for the project work effort and the valid data that should be keyed into each field. These fields are used to evaluate and measure the health of the budget and are required entry fields.

Actual To-Date Data

All of these fields are references to values in the Variable Values section and the Monthly Planned and Actual Values section or derived from those values and should not be altered. These are used to assist the project manager track and measure the progress and variances to the project budget.

The table below describes each field and how it is used. The values in this section are used in the objective scoring of the budget and will be explained in the Objective Scoring section later in this document. The values in this section are referenced in the Financials section of the 'Dashboard p1' worksheet.

Field Name	Description
Total Budget (State)	This is the dollar amount allocated to the project in State funds. Referenced Field.
Total Budget (Other Funds)	This is the dollar amount allocated from any other funding source.

Field Name	Description
	Referenced Field.
Total Project Budget	This is the addition of State and Other Funds. This should be the total dollars allocated to the project. Calculated Field.
Total Planned Expenditures (Project to Date)	This is the dollar amount of the monthly Planned Expenditures from the Monthly Planned and Actual Values table based on the As Of Date of the dashboard. Referenced Field.
Total Actual Expenditures (Project to Date)	This is the dollar amount of the monthly Actual Expenditures from the Monthly Planned and Actual Values table based on the As Of Date of the dashboard. Referenced Field.
Expenditure Variance	This is the difference between the Actual Expenditures and the Planned Expenditures stated above. Calculated Field.
Available Funds to Complete Project	This is the difference between the Total Project Budget and the Actual Expenditures stated above. Calculated Field.

An example of this data is displayed below.

FINANCIALS: Actual to Date						
Total Budget (State) (a)	Total Budget (Other Funds) (b)	Total Project Budget (c) (a+b)	Total Planned Expenditures (Project to Date) (d)	Total Actual Expenditures (Project to Date) (e)	Expenditure Variance ('+' = Overbudget, '-' = Underbudget) (f) (e-d)	Available Funds to Complete Project (g) (c-e)
$5,000,000	$0	$5,000,000	$ 500,000	$ 500,000	$0	$4,500,000

Projected Financials

All of these fields are references to values in the Variable Values section and the Actual to Date Values section or derived from those values and should not be altered. These are used to assist the project manager track additional funding needed to complete the project and determine variances to the project budget.

The table below describes each field and how it is used. The values in this section are referenced in the Financials section of the 'Dashboard p1' worksheet.

Field Name	Description
Estimated Funds Needed to Complete	This is the dollar amount that is estimated to complete the project. This is an amount in addition to the available funds to complete the project.
Budget Variance	This is the difference between the Available Funds to Complete the project and the Estimated Funds needed to Complete the Project.

An example of this data is displayed below.

FINANCIALS: Projected	
Estimated Funds Needed to Complete Project (h)	Budget Variance (i) (g-h)
$ -	$4,500,000

Practices Guide – Budget Detail Worksheet

Variable Values

These fields are the primary entry fields for the project budget and are required entry. The table below describes each field and how it is used.

Field Name	Description
State Budget	Funds allocated by the State to accomplish the projects objectives. Required Entry.
Other Funds	Other funding sources used by the project to accomplish its objectives, i.e. federal funding, bonds, grants, etc. Required Entry.
Estimated Funds Needed to Complete	Funds estimated by the project manager that will be need in addition to the project budget to accomplish the objectives of the project. This should not be confused with available funds to complete the project. Enter if needed.

An example of this data is displayed below.

Variable Fields:					
State Budget:	$ 5,000,000	Other Funds:	$ -	Projected Estimated Funds Needed to Complete Project	$ -

Monthly Planned and Actual Values

These fields indicate the monthly planned and actual spend for the project. The entire planned spend for the project can be entered. The to-date amount is determined by the as of date. The table below describes each field and how it is used.

Field Name	Description
Reporting Period	Pre-determined reporting periods. These can be adjusted or expanded based upon the project's total duration. Please inform the Enterprise Portfolio Manager of any changes as certain calculations depend on these tables.
Planned (Project to Date)	Enter the amount planned to be spent for each corresponding reporting period.
Actual (Project to Date)	Enter the actual amount spent for each corresponding reporting period.
Variance	This field is the calculated variance between the Planned Spend and the Actual Spend.
As Of Date	This field is the As of Date from the 'Dashboard p1' worksheet and is used to determine the to-date calculation.

An example of this data is displayed below.

Practices Guide – Budget Detail Worksheet

	Planned	Actual	Variance	As of Date
Reporting Period	Project to Date (c)	Project to Date (f)	Project to Date ((c-f)/c)*100	30-Nov-10 <=40512
FY11				
Jul-10	$ 100,000	$ 100,000	0%	
Aug-10	$ 100,000	$ 100,000	0%	
Sep-10	$ 100,000	$ 100,000	0%	
Oct-10	$ 100,000	$ 100,000	0%	
Nov-10	$ 100,000	$ 100,000	0%	
Dec-10	$ 200,000		100%	
Jan-11	$ 200,000		100%	
Feb-11	$ 200,000		100%	
Mar-11	$ 200,000		100%	
Apr-11	$ 200,000		100%	
May-11	$ 250,000		100%	
Jun-11	$ 250,000		100%	
	$ 500,000	$ 500,000	0%	

Objective Scoring of the *Budget Detail* Worksheet

The Budget Detail worksheet is measured and given a health rating based upon several criteria described in the list below. The metrics are derived from the data provided in the Variable Fields section and Monthly Planned and Actual Values section. The sequences below describe each metric and how it contributes to the overall objective score for the budget.

In the Status section the following calculation is made:

1. The to-date amounts are derived from the Monthly Planned and Actual Values section. The monthly amounts are summed in the Planned Project to Date columns and placed in the Total Planned Expenditures field. The monthly amounts are summed in the Actual Project to Date columns and placed in the Total Actual Expenditures field.
2. Total Planned Expenditures are subtracted from Total Actual Expenditures and then divided by Total Planned Expenditures giving a variance to plan percentage. This ratio is the Status of the budget
3. The Status is then evaluated as follows;
    a. A Status less than or equal to 10% yields a Green code,
    b. A Status less than or equal to 20% yields a Yellow code,
    c. A Status greater than 30% yields a Red code.

The table below is the result of the example data used in this guide.

Status:	**0.00%**	**Green**

100.00%

Practices Guide – Budget Detail Worksheet

Subjective Scoring of the *Budget Detail* Worksheet

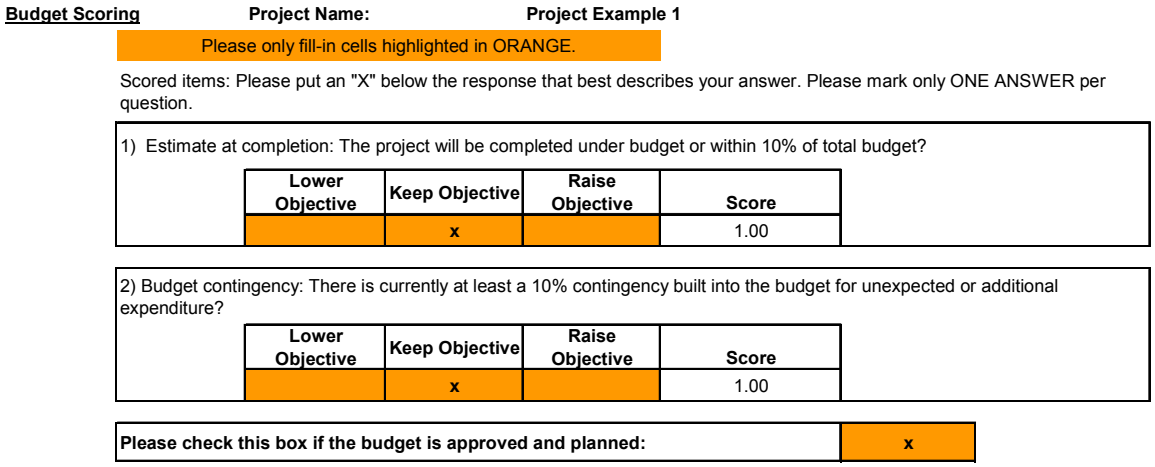
As in each of the worksheets in the PM Dashboard, the Budget Detail worksheet has a subjective scoring section. This allows the project manager to raise or lower the overall health score by identifying compliance to two items.

The first item measures whether the project will complete within 10% of the budget. Industry standards and best practices allow for a project to complete within 10% of the budget and still be considered successful.

The second item measures whether a contingency budget of at least 10% has been set aside for funding of unknown risks.

The third item measures whether the budget has been approved or not. The subjective scoring section is depicted in the diagram below.

The subjective scoring section works in the following manner. The Status, calculated in the previous section, is used as a base for the Subjective Scoring. To decrease a subjective score place an 'x' in the "Lower Objective" field. This will decrease the score by 0.20 points. Do the same to the "Raise Objective" field to increase the subjective score by 0.20 points. Also, make sure you delete the 'x' from the field you are not using. To drive the subjective score to "Red" you can blank out all the subjective scoring fields.



Budget Scoring **Project Name:** **Project Example 1**

Please only fill-in cells highlighted in ORANGE.

Scored items: Please put an "X" below the response that best describes your answer. Please mark only ONE ANSWER per question.

1) Estimate at completion: The project will be completed under budget or within 10% of total budget?

Lower Objective	Keep Objective	Raise Objective	Score
	x		1.00

2) Budget contingency: There is currently at least a 10% contingency built into the budget for unexpected or additional expenditure?

Lower Objective	Keep Objective	Raise Objective	Score
	x		1.00

Please check this box if the budget is approved and planned:	x

Practices Guide – Budget Detail Worksheet

Overall Scoring of the *Budget Detail* Worksheet

The Total Overall score for the Budget Detail worksheet used on the dashboard is derived by taking the average of the Objective Score and the Subjective Score i.e. ((Subjective Score + Objective Score) / 2).

The Objective Score is calculated as:

1. If the budget approved indicator box is filled with an 'x' the Objective Score is the calculated Status Score,
2. Else the Objective Score equals the Status Score minus 0.11.

The Subjective Score is the average of the two subjective scores from the previous section.

The Total Overall score is referenced by the Budget Health Indicator section on the 'Dashboard p1' worksheet to be the Current Health Rating. The diagram below illustrates this score.

Summary of Schedule Score:			
Subjective score summary:			100.00%
Objective score summary:			100.00%
Total Overall Score:			100.00%

Practices Guide – Budget Detail Worksheet

Explanation of the *Budget* Dashboard Health Indicator Section

The Budget Health Indicator section is located on the Dashboard page 1 worksheet. It contains two sections, the first is the health score, the second is the comments section.

The health score section is divided into three areas; the Previous Health rating, the Current health rating, and the Trend Indicator. The Previous health rating is controlled by the project manager and should be updated before updating the Budget Details worksheet by keying in the health indicator of the Current section (Green, Yellow, or Red). The Current health rating is determined by the overall health score from the Budget Details worksheet. If that score is less than .80 the field is filled in red and the word "Red" appears in the field. If the value is between .80 and .89 the indicator is "Yellow", and if the value is .90 or higher the indicator is "Green". The Trend Indicator is the direction the project manager thinks the health of the budget is heading in. A table is provided below to give an understanding of the scoring in relation to the stop-light indicators and trend indicators.

The Comments area of the Health Indicator section is free form text to be updated by the project manager. The words "Comments" can be overwritten if desired. This area is where the project manager should comment on any risks or issues related to the budget. This could include things like the anticipated change of scope, issues related to project effort that may impact the costs, some internal or external factor that might impact the budget. This area is meant to be brief and factual, discussing items that the governance body will need to know.

The Budget Health Indicator Section of the dashboard is depicted in the diagram below.

BUDGET		
Previous	Current	Trend
N/A	**Green**	**N/C**
Comments:		

Green (0.90 - 1.00)
Yellow (0.80 - 0.89)
Red (0.00 - 0.80)

Trend Indicators:
+ = Improving
- = Declining
N/C = No Change

PRACTICES GUIDE PM DASHBOARD - BUSINESS OBJECTIVE DETAIL WORKSHEET

Version Number: 1.0

Version Date: 01/01/2011

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Practices Guide – Business Objective Detail Worksheet

Introduction to the *Business Objective Detail* Worksheet

Business Objectives are the reason a project is undertaken. The Business Objectives lay out the primary foundation for project requirements and future work effort the project team is to accomplish. These objectives should be clear, concise, and measurable. Even though most business objectives will not be fully realized until after the project is delivered to the business, it is important for the project team and executive leadership to understand the dynamic between the project effort and the end result of the project through the business objectives. These objectives will guide the project team in there design of the solution, development of the effort to produce the solution, and how the solution is to be tested. The objectives become the guide by which the project team and governance body can determine if the project remains on course. Therefore there becomes a need to identify and measure the business objectives of the project.

The Business Objective Detail worksheet has been revised to better reflect the overall business objectives of the project and allow a more objective measurement of their success during the project lifecycle. This Practices Guide will discuss the four major sections of the worksheet and explain how to complete them and evaluate the metrics as they relate to the overall health rating of the project.

The four sections cover the informational data fields for an objective, methods used to measure a business objective, the objective scoring of the worksheet, and the methods used to evaluate the subjective scoring of the worksheet.

Explanation of the *Business Objective Detail* Data Fields

This section explains the informational data fields for an objective and the valid data that should be keyed into each field. These fields are used to evaluate and measure the health of an objective and are required entry fields.

Business Objectives Informational Fields

Each business Objective has characteristics that help the project manager understand their importance and dynamic to the project effort. These characteristics can also be measured to help the project manager and governance body understand the health of the objective and the overall health of the project.

The following table identifies and describes each informational field and discusses the valid data to be entered.

Field Name	Description
Objective #	This is a user-defined identifier for the objective. Alpha-numeric data is valid for this field.
Description	This field is text that describes the objective to achieve. The project manager should use the SMART approach when describing the objective.
Category	This field identifies the type of objective to be achieved. The data to

Field Name	Description
	populate this field comes from a drop-down list. Valid entries include a blank, “Business Objective”, “Technical Objective”, “Quality Objective”, “Federal Requirement”, or “Legislative Mandate”.
Status	This field identifies the status of an objective. The data to populate this field comes from a drop-down list. Valid entries include a blank, “Open”, “Achieved”, or “Removed”.
Weighting	This field identifies the importance to place on the objective. This is used in scoring and is also useful for decision making. The data to populate this field comes from a drop-down list. Valid entries include a 1, 2, or 3.
Business Owner	This field describes the individual or governing group that owns the objective. The data to populate this field is user-defined. Valid entries include blanks, or text.
State Strategic Alignment	This field identifies the State strategic goals this objective aligns to. The data to populate this field comes from a drop-down list. Valid entries include “Safe Georgia”, “Educated Georgia”, “Healthy Georgia”, “Growing Georgia”, or “Best Managed”. A blank is not allowed and will cause a decrease in the overall individual score of the objective.
Number of Requirements	This field identifies the number of requirements associated with the objective. The data to populate this field is user-defined. Valid entries include blanks, or numbers.
Number Requirements Completed	This field identifies the number of requirements associated with the objective that have been completed as a result of the project effort. The data to populate this field is user-defined. Valid entries include blanks, or numbers.
Removal Approval Date	This field identifies the date an objective was removed from the project. The data to populate this field is user-defined. Valid entries include blanks, or a date in mm/dd/yyyy format.
Rebaselined	This field identifies whether the project schedule has been rebaselined after the removal of the objective. The data to populate this field comes from a drop-down list. Valid entries include a blank, “Yes”, or “No”.
Measurement Used	This field describes the measurement to be used for determining the success of the objective. The data to populate this field is user-defined. Valid entries include blanks, or text.
Change Control	This field identifies whether a change control process is used to manage the scope of the objective. The data to populate this field comes from a drop-down list. Valid entries include a blank, “Yes”, or “No”.
Date to Start Measuring	This field identifies the date when an objective begins to be measured to determine success toward defined measurements. The data to populate this field is user-defined. Valid entries include blanks, or a date in mm/dd/yyyy format.

Explanation of the Drop-down Lists

Several data fields use drop-down lists to populate them. These are used to assist the project manager select valid data to be tracked and measured. The table below describes the drop-down list and the available selections on the list. The items in the list are static and can not be amended without approval of the GTA Enterprise Program Management Office.

Drop-down List	Description
As-of-Date	This table contains the date value that is 30 days prior to the As-of-Date

Drop-down List	Description
	entered in cell F6 of the 'Dashboard p1' worksheet. It is used when measuring the validity of a removed objective.
Category	This list contains the valid categories of an objective. This helps the project manager and governing body understand the types of objective to be achieved.
Status	This list contains the valid status types for an objective. An objective may be either open, achieved, or removed. A blank status indicates a newly identified objective. This status should rarely be used.
Yes/No	This list is used to indicate either a positive or negative response. It is used for the Rebaselined field and the Change Control field.
Weighting	This list allows the project manager to assign an importance level to the objective. A weighting of 1 indicates a 'Nice to Have' objective. A weighting of 2 indicates a 'Mission Critical' objective. A weighting of 3 indicates a 'Must Have' objective. Weightings can assist in prioritizing objectives if time or budget constraints warrant that kind of decision.
Strategic Alignment	This list identifies the five strategic categories defined for the State of Georgia. In most cases a project will be aligned to one of these strategic initiatives. However, there may arise an occasion when a project will deliver a solution that aligns to more than one. Thus the reason to allow an objective to align to any of the strategic categories.

Example of the Objectives Informational Data

The following diagrams display example data for completing the Business Objectives Informational Data section of the worksheet.

Objective #	Description	Category	Status	Weighting	Business Owner
1	Standardize the financial system platform for all appropriated agencies	Business Objective	Open	2	Bill
2	Convert current HOV lanes into HOT lanes in the high volume corridor for the purpose of providing trip time reliability, maintaining traffic flow in the HOT lane and reducing peak hour traffic congestion in the general use lanes	Business Objective	Open	3	Joe
3	Create an enterprise data hub and portal to improve access to and usage of data by all educational data providers/consumers across the State	Technical Objective	Open	2	Sam
4	Accurate administration of Medicaid/PeachCare claims	Business Objective	Open	3	Bill

Practices Guide – Business Objective Detail Worksheet

Objective #	Description	Strategic Alignment	Number of Requirements	Number Reqmnts Completed
1	Standardize the financial system platform for all appropriated agencies	Best Managed	10	0
2	Convert current HOV lanes into HOT lanes in the high volume corridor for the purpose of providing trip time reliability, maintaining traffic flow in the HOT lane and reducing peak hour traffic congestion in the general use lanes	Growing Georgia	25	0
3	Create an enterprise data hub and portal to improve access to and usage of data by all educational data providers/consumers across the State	Educated Georgia	8	0
4	Accurate administration of Medicaid/PeachCare claims	Healthy Georgia	25	0

Objective #	Description	Removal Approve Date	Rebaselined	Measurement Used	Change Control	Date to Start Measuring
1	Standardize the financial system platform for all appropriated agencies			EV	Yes	7/1/2011
2	Convert current HOV lanes into HOT lanes in the high volume corridor for the purpose of providing trip time reliability, maintaining traffic flow in the HOT lane and reducing peak hour traffic congestion in the general use lanes			Cost-Benefit	Yes	7/1/2011
3	Create an enterprise data hub and portal to improve access to and usage of data by all educational data providers/consumers across the State			Pct Increase	Yes	7/1/2011
4	Accurate administration of Medicaid/PeachCare claims			Cost Reduction	Yes	8/1/2011

Measuring the Business Objectives

Each objective is scored according to particular data elements populated on the worksheet. The governance body wants to understand several things about the projects objectives in order to determine the overall viability of the project and its chances of success. Answering the following questions can provide information to assure the governance body that we are doing the right things by aligning to strategy, we are doing them the right way by assigning ownership and change control, we are doing them well by defining measurement criteria, and we will get benefit by tracking those metrics. Have requirements been identified for an objective? Was the objective removed from the project? Will the objective be measured for success upon achieving it and when does the team anticipate measuring the outcomes? Is the objective aligned to a strategic initiative? Is someone responsible for making sure the objective is being managed during the life of the project? Is a change control process is in place to manage changes to requirements during the project?

Practices Guide – Business Objective Detail Worksheet

Business Objectives Metric Fields

These are calculated fields and should not be manually updated. They contain formulas used in the worksheet. Below is a list and explanation of each field.

- Pct Cmplt: Ratio of the number of completed requirements to the number of requirements for the objective
- Removal OK: A Yes/No determination based on several factors. If the status is not "Removed" the field is left blank, which has a positive impact on the "Requirements Removed" score. Otherwise the objective must have a removal date and the "Rebaselined" field must be "Yes", which indicates the removal was approved on a particular date and the project schedule has been rebaselined. An additional check occurs to make sure the "Removal Approve Date" is 30 days prior to the dashboard As-Of-Date. This allows a removed objective to not count against the score past the current reporting period. If these conditions are met the "Removal OK" field is "Yes", otherwise it is "No".
- (1) Are Requirements Identified: If the number of requirements associated with the objective is greater than zero the field is given a value equal to the weighting, otherwise a value of zero is assigned.
- (2) Will a Metric Be Used: If "Measurement Used" contains a value then the field is given a value equal to the weighting, otherwise a value of zero is assigned.
- (3) Requirements Removed: If "Removal OK" equals "No" then the field is given a value of negative 1 times the weight, otherwise if "Removal OK" is "Yes" or blank the field is given a value equal to the weighting.
- (4) Aligned to Strategy: If "Strategic Alignment" is not blank the field is given a value equal to the weighting, otherwise a value of zero is assigned.
- (5) Owner Assigned: If "Business Owner" is not blank the field is given a value equal to the weighting, otherwise a value of zero is assigned.
- (6) Change Control Used: If "Change Control" is "Yes" the field is given a value equal to the weighting, otherwise a value of zero is assigned.
- Individual Scores: This score multiples 3 by the average of measures 1 – 5 above and divides it that number by the weighted value.

Example of the Objectives Informational Data Metrics

The following diagram displays example data for the metrics associated with the Business Objectives Informational Data section of the worksheet.

Objective #	Description	Pct Cmplt	Removal OK	Are Reqmnts Identified?	Will a Metric Be Used?	Reqmnts Removed?	Aligned to Strategy?	Owner Assigned?	Change Control Used?	Individual Scores
1	Standardize the financial system platform for all appropriated agencies	0%		2	2	2.00	2	2	2	**3.00**
2	Convert current HOV lanes into HOT lanes in the high volume corridor for the purpose of providing trip time reliability, maintaining traffic flow in the HOT lane and reducing peak hour traffic congestion in the general use lanes	0%		3	3	3.00	3	3	3	**3.00**
3	Create an enterprise data hub and portal to improve access to and usage of data by all educational data providers/consumers across the State	0%		2	2	2.00	2	2	2	**3.00**
4	Accurate administration of Medicaid/PeachCare claims	0%		3	3	3.00	3	3	3	**3.00**

Practices Guide – Business Objective Detail Worksheet

Objective Scoring of the *Business Objective Detail* Worksheet

The Business Objective Detail worksheet is measured and given a health rating based upon several criteria described in the list below. Each metric is a ratio of a count of items against the total number of objectives identified. The ratio is multiplied by the modifier 3 to translate the ratio into a score between one and three. This raw score is then multiplied by a weight factor to determine that measures contribution to the overall health score. The aggregate health score is used as the objective worksheet score and as the score value on the Business Objectives Health Indicator section of the dashboard.

1. The percent of objectives tied to requirements. The measure counts the number of objectives that indicate requirements greater than 0 and divides that by the number of objectives identified.
2. The percent of objectives using a measurement. The measure counts the number of objectives that have a measurement identified and divides that by the number of objectives identified.
3. The percent of objectives removed. The measure counts the number of objectives with a status of "Removed" and divides that by the number of objectives identified. This measure works in reverse to the other measures, i.e. if no objectives are removed (0.00) the highest score is earned, however if all objectives are removed (1.00) the lowest score is earned.
4. The percent of objectives aligned to a strategy. The measure counts the number of objectives with an alignment to a strategy and divides that by the number of objectives identified.
5. The percent of objectives with a business owner. The measure counts the number of objectives assigned an owner and divides it by the number of objectives identified.
6. The percent of objectives using a change control process. The measure counts the number objectives indicating "yes" in the Change Control field and divides that by the number of objectives identified.
7. The average of all the individual objective scores is used for this measure.

The table below is the result of the example data used in this guide.

	Ratio Scores	Raw Scores	Score	Weights
Pct of Objectives tied to Requirements	1.00	3.00	0.60	0.20
Pct of Objectives using measurements	1.00	3.00	0.45	0.15
Pct of Objectives Removed	0.00	3.00	0.30	0.10
Pct of Objectives Strategicly Aligned	1.00	3.00	0.30	0.10
Pct of Objectives with Business Owner	1.00	3.00	0.30	0.10
Pct of Objectives with Change Control	1.00	3.00	0.45	0.15
Individual Objectives Score	3.00	3.00	0.60	0.20
Overall Objectives Score (1.0 - 3.0)		3.00	1.00	1.00
		2.7 - 3.0 ---> Green (0.90 - 1.00) 2.4 - 2.7 ---> Yellow (0.80 - 0.89) 1.0 - 2.4 ---> Red (0.00 - 0.80)		

Practices Guide – Business Objective Detail Worksheet

Subjective Scoring of the *Business Objective Detail* Worksheet

As in each of the worksheets in the PM Dashboard, the Business Objective Detail worksheet has a subjective scoring section. This allows the project manager to raise or lower the overall health score by identifying compliance to two items.

The first item is the use and maintenance of a valid traceability matrix. A traceability matrix allows visibility throughout the project lifecycle of the business objective, its associated requirements, the work associated with the requirement, and the testing to assure the compliance of the work to the requirement and to the objective.

The second item is the project manager's subjective understanding of the ability of the project to maintain its track to achieve the objectives set out in the business case. The subjective scoring section is depicted in the diagram below.

The subjective scoring section works in the following manner. The Overall Objective Score, calculated in the previous section, is used as a base for the Subjective Scoring. To decrease a subjective score place an 'x' in the "Lower Objective" field. This will decrease the score by 0.25 points. Do the same to the "Raise Objective" field to increase the subjective score by 0.25 points. Also, make sure you delete the 'x' from the field you are not using. To drive the subjective score to "Red" you can blank out all the subjective scoring fields.

Business Objective Scoring	**Project Name:**	**Project Example 1**

Please only fill-in cells highlighted in ORANGE.

Scored items: Please put an "X" below the response that best describes your answer. Please mark only ONE ANSWER per question.

1) Traceability Matrix: The project maintains a proper traceability matrix, which traces the business objectives to requirements, requirements to work effort, and work effort to testing?

Lower Objective	Keep Objective	Raise Objective	Score
	x		1.00

2) Business case alignment: The project is still on target to achieve the original vision and business case and will achieve the expected benefits?

Lower Objective	Keep Objective	Raise Objective	Score
	x		1.00

Summary of Schedule Score:				
Subjective score summary:				100.00%
Objective score summary:				100.00%
Total Overall Score:				100.00%

Overall Scoring of the *Business Objective Detail* Worksheet

The Total Overall score for the Business Objective Detail worksheet used on the dashboard is derived by taking the average of the Objective Score and the Subjective Score i.e. ((Subjective Score + Objective Score) / 2).

The Objective Score is the Overall Objective Score

The Subjective Score is the average of the two subjective scores from the previous section.

The Total Overall score is referenced by the Business Objectives Health Indicator section on the 'Dashboard p1' worksheet to be the Current Health Rating. The diagram below illustrates this score.

Practices Guide – Business Objective Detail Worksheet

Explanation of the *Business Objectives* Dashboard Health Indicator Section

The Business Objectives Health Indicator section is located on the Dashboard page 1 worksheet. It contains two sections, the first is the health score, the second is the comments section.

The health score section is divided into three areas. The Previous Health rating, the Current health rating, and the dashboard score. The Previous health rating is controlled by the project manager and should be updated before updating the Business Objective Detail worksheet by keying in the health indicator of the Current section (Green, Yellow, or Red). The Current health rating is determined by the overall health score from the Business Objective Detail worksheet. If that score is less than .80 the field is filled in red and the word "Red" appears in the field. If the value is between .80 and .89 the indicator is "Yellow", and if the value is .90 or higher the indicator is "Green". The dashboard score section is the objective score from the Business Objective Detail worksheet and will range from zero to one. The closer the score is to one the better the health of the projects business objectives. A table is provided below to give an understanding of the scoring in relation to the stop-light indicators.

The Comments area of the Health Indicator section is free form text to be updated by the project manager. The words "Comments" can be overwritten if desired. This area is where the project manager should comment on any risks or issues related to the business objectives. This could include things like the anticipated removal of an objective, issues related to project effort that may impact the delivery of an objective, or new objectives are being added due to some internal or external factor. This area is meant to be brief and factual, discussing items that the governance body will need to know.

The Business Objectives Health Indicator Section of the dashboard is depicted in the diagram below.

BUSINESS OBJECTIVES		
Previous	Current	Score
N/A	Green	1.00
Comments:		

Green	(0.90 - 1.00)
Yellow	(0.80 - 0.89)
Red	(0.00 - 0.80)

PRACTICES GUIDE PM DASHBOARD - RISK DETAIL WORKSHEET

Version Number: 1.0

Version Date: 01/01/2011

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Practices Guide – Risk Detail Worksheet

Introduction to the *Risk Detail* Worksheet

Risk Management is a method of managing that concentrates on identification and controlling the areas or events that have a potential of causing unwanted change. The nature of any given risk is composed of three elements: the event, the probability, and the severity (or impact). To complete the management of risk the project manger must then establish response strategies that appropriately address the risk, assign individuals to monitor and control the risk, and lastly report on the status and health of the risk and the risk plan.

The *Risk Detail* worksheet contains pertinent data regarding the project risk that allows for the objective measurement of how well risk is being managed on the project during its lifecycle. The worksheet also gives an indication of the level of risk held in the project. This Practices Guide will discuss the four major sections of the worksheet and explain how to complete them and evaluate the metrics as they relate to the overall health rating of the project.

The four sections cover the risk detail data, methods used to measure the risk score, the objective scoring of the worksheet, and the methods used to evaluate the subjective scoring of the worksheet.

Explanation of the *Risk Detail* Data Fields

This section explains the risk detail data fields for the project and the valid data that should be keyed into each field. These fields are used to evaluate and measure the level of risk contained in the project and how well risk is being managed by the project team. These are required entry fields.

Risk Management Data

In order to appropriately manage the risk in a project several elements of risk management must be recorded and tracked. The data provided in this section will satisfy the risk management processes of Risk Identification, Risk Analysis, Risk Response Strategy, and Risk Control. As a result of the recording of this data, metrics will be derived that will indicate to the project manager and governing bodies the strength of the teams risk management capability and the level of risk contained in the project.

The following table identifies and describes each field and discusses the valid data to be entered.

Field Name	Description
Risk Number	Optional. A user-defined identifier.
Risk Description	Required. This field describes the risk event that should also include the consequences if the risk occurs. A best practice to follow when writing the Risk description is: **[Event] may happen to the project, causing [impact to the project objectives].**
Probability of Occurrence	Required. This field signifies the likelihood that a risk will occur as ‘High’, ‘Medium’, or ‘Low’.
Impact to Project	Required. This field signifies the impact the risk will have on the project as

Practices Guide – Risk Detail Worksheet

Field Name	Description
	'High', 'Medium', or 'Low'.
Mitigation Strategy	Required or Cat 1 or Cat 2 risks. This field identifies the action to be taken and response approach to the identified risk. Not entering a response strategy for Cat 1 or Cat 2 risks will impact the risk health status. A Cat 1 and Cat 2 risk will be defined in the next section.
Objective Associated to	Optional. Enter the id of the associated Business Objective if applicable.
Risk Owner	Required. Enter the individual responsible to manage the risk.
Last Risk Review	Required. Enter the date this risk was last reviewed.
Days Since Last Review	Calculated. The number of days between the last review and the as of date.

An example of this data is displayed below.

Risk Number	Risk Description	Probability of Occurence	Impact to Project
Sequential Assigned Number	*Brief description of Risk*	*Enter: High, Medium or Low*	*Enter: High, Medium or Low*
	Risk 1	Medium	Low
	Risk 2	High	High
	Risk 3	High	Low

Risk Number	Risk Description	Mitigation Strategy/Action Plan	Objective Associated To
Sequential Assigned Number	*Brief description of Risk*	*Brief overview of mitigation steps*	*Enter the Objective the Risk is associated to*
	Risk 1		1
	Risk 2	plan	1
	Risk 3	Plan	1

Risk Number	Risk Description	Monitor and Control		
Sequential Assigned Number	*Brief description of Risk*	Risk Owner	Last Risk Review	Days Since Last Review
	Risk 1	Bob	10/25/2010	27
	Risk 2			
	Risk 3			

Risk Category and Scoring Fields

All of these fields are calculations based on the risk data supplied and should not be altered. These are used to assist the project manager track and measure the risk in the project. The table below describes each field and how it is used. The metrics derived from this section are used in the objective scoring of the risk, which is explained in a section later in this document.

Practices Guide – Risk Detail Worksheet

IMPACT				
	High	Cat 2	Cat 1	Cat 1
	Medium	Cat 3	Cat 2	Cat 1
	Low	Cat 3	Cat 3	Cat 2
		Low	Medium	High
		PROBABILITY		

Field Name	Description
Category 1 Risk	A Category 1 risk is any risk that falls inside the following criteria for probability of occurrence and impact to the project. High Probability and High Impact; High Probability and Medium Impact; or Medium Probability and High Impact.
H/H, H/M, M/H	A 1 is placed in the cell of the corresponding Probability and Impact entered earlier. If the Probability and Impact do not meet the criteria a 0 is placed in the field.
Category 2 Risk	A Category 2 risk is any risk that falls inside the following criteria for probability of occurrence and impact to the project. High Probability and Low Impact; Medium Probability and Medium Impact; or Low Probability and High Impact.
H/L, M/M, L/H	A 1 is placed in the cell of the corresponding Probability and Impact entered earlier. If the Probability and Impact do not meet the criteria a 0 is placed in the field.
Category 3 Risk	A Category 3 risk is any risk that falls inside the following criteria for probability of occurrence and impact to the project. Medium Probability and Low Impact; Low Probability and Medium Impact; or Low Probability and Low Impact.
M/L, L/M, L/L	A 1 is placed in the cell of the corresponding Probability and Impact entered earlier. If the Probability and Impact do not meet the criteria a 0 is placed in the field.

An example of this data is displayed below.

Risk Description	Probability of Occurence	Impact to Project	Category 1			Category 2			Category 3		
Brief description of Risk	*Enter: High, Medium or Low*	*Enter: High, Medium or Low*	H/H	H/M	M/H	H/L	M/M	L/H	M/L	L/M	L/L
Risk 1	Medium	Low	0	0	0	0	0	0	1	0	0
Risk 2	High	High	1	0	0	0	0	0	0	0	0
Risk 3	High	Low	0	0	0	1	0	0	0	0	0

Risk Description	Mitigation Strategy/Action Plan	Scoring	
Brief description of Risk	*Brief overview of mitigation steps*	Category 1 Mitigation Check	Risk Score
Risk 1		0	3
Risk 2	plan	1	1
Risk 3	Plan	0	2

Field Name	Description
Category 1 Mitigation Check	If a risk is designated as a Category 1 it must have a Mitigation Strategy. If it is determined that there is a mitigation strategy a 1 is placed in the field otherwise a 0 is inserted. This metric is used as a component of the risk health status calculation explained in the Objective scoring section below.
Risk Score	The risk category fields are evaluated and this field is updated based on the following criteria. If the risk is a category 1 a 1 is inserted, if a category 2 a 2 is inserted, if a category 3, a 3 is inserted. These fields are used to determine the level of risk carried by the project.

Additional Scoring Fields

This scoring section measures the various functions of risk management tracked on this worksheet. The scoring criteria are explained below.

1. **Status Test:** There are two tests that determine this score. First, all Category 1 risks must have a Mitigation Plan. Second, all Category 1 and 2 risks must have a Mitigation Plan. If both tests are passed a score of .90 (Green) is given. If the first test is passed but not the second a score of .80 (Yellow) is given. If neither test is passed a score of .79 (Red) is given. This score is used to determine the Objective score for the Risk Worksheet.
2. **Scored Risks (Prob/Impact):** This score determines a ratio of the number of Category 1, 2, and 3 risks to the total number of risks identified with a Probability and Impact. The closer the score is to 1 the better. This score measures the completeness of the risk analysis performed on the project.
3. **Pct of Cat 1 Risks with Response Plan:** This score determines a ratio of the number of Category 1 risks to the number of Category 1 Risks that have a Mitigation Plan. The closer the score is to 1 the better.
4. **Pct of Cat 1 Risks to Total # Risks:** This score is a ratio of the number of Category 1 risks to the total number of risks for the project. The higher the ratio the riskier the project.
5. **Count of Risks:** This score is a simple summation of the number of risks identified.
6. **Level of Risk:** This score is determined by assigning each Category of risk a numeric value. A Category 1 risk is given a value of 1, Category 2 is given a value of 2, and a Category 3 is given a value of 3. These values are averaged and then divided by 3 to determine a ratio between 1 and 3. The closer the ratio is to 1 the more risk the project holds. This score is used to determine the Risk Score value in the Risk Health Indicator section on the Dashboard.
7. **Monitor and Control:** This score is the average of the two scores in the Monitoring and Control section 'Number of Risk Owners' and 'Average days since last Risk Review'. The score helps to understand if risks are being monitored by someone and controlled through a review process. The metric uses 30 days as the standard review cycle.

An example of this data is displayed below.

Status Test:		0.90
Scored Risks (Prob/Impact)		1.00
Pct of Cat 1 Risks with Response Plan		1.00
Pct of Cat 1 Risks to Total # Risks		0.33
Count of Risks		3.00
Level of Risk		0.67
Monitor and Control (Rvws 30 days)		0.62

The scores for this projects risk management practices can be interpreted thusly:

1. The project scores high in its Objective Score with both Category 1 and 2 risks having mitigation plans identified.
2. Scores high in risk identification and assigning a probability of occurrence and impact.
3. Scores high in developing response strategies for Category 1 risks.
4. The project has a relative low level of risk, i.e. one out three risks is a Category 1.
5. Only three risks have been identified. This may not be appropriate and further risk identification may be needed.
6. The level of total risk the project carries is in the medium range and should be monitored closely.
7. The ability to monitor and control the risks is showing as a weakness.

Objective Scoring of the *Risk Detail* Worksheet

The Risk Detail worksheet is measured and given a health rating based upon the criteria described in the list below. The metrics are derived from the data keyed into the worksheet and uses the Status Test metric to determine Risk health. The sequences below describe each metric and how it contributes to the overall objective score for the project risk.

1. There are two tests that determine this score.
    a. First, all Category 1 risks must have a Mitigation Plan. The Category 1 levels of H/H, H/M, and M/H are summed and compared to the Category 1 Mitigation Check field. If they are equal the test passes.
    b. Second, all Category 1 and 2 risks must have a Mitigation Plan. The Category 1 levels and Category 2 levels of H/H, H/M, M/H, H/L, M/M, and L/H are summed and compared to the sum of the Mitigation Strategy/Action Plan field. If they are less than or equal the test is passed.
2. If both tests are passed a score of .90 (Green) is given.
3. If the first test is passed but not the second a score of .80 (Yellow) is given.
4. If neither test is passed a score of .79 (Red) is given.
5. This score is used to determine the Objective score for the Risk Worksheet which is explained in the Overall Scoring section below.

Practices Guide – Risk Detail Worksheet

Subjective Scoring of the *Risk Detail* Worksheet

As in each of the worksheets in the PM Dashboard, the Risk Detail worksheet has a subjective scoring section. This allows the project manager to raise or lower the overall health score by identifying compliance to two items.

The first item is the use and maintenance of a proper risk management plan. A risk management plan describes the methodology and scoring of risks, how they are to be identified, analyzed, responded to, and monitored.

The second item is the frequency of the risk plan review. It is expected that the project manager, project team, and stakeholders review the project risks on a monthly cycle to verify all risks have been identified and validate the probability and impact, the response strategies, and any actions required to manage the risks. The subjective scoring section is depicted in the diagram below.

The subjective scoring section works in the following manner. An average of the two scores is taken and used as the overall subjective score. A decrease or increase in the subjective score will change the overall health score of the Risk Detail worksheet. To decrease a subjective score place an 'x' in the "Lower Objective" field. Do the same to the "Raise Objective" field to increase the subjective score. Also, make sure you delete the 'x' from the field you are not using. To drive the subjective score to "Red" you can blank out all the subjective scoring fields.

Please only fill-in cells highlighted in ORANGE.

Scored items: Please put an "X" below the response that best describes your answer. Please mark only ONE ANSWER per question.

1) Risk management plan: The project maintains a proper risk management plan, including risk identification, probability of occurrence (H,M,L), impact (H,M,L) and mitigation/response strategy.

Lower Objective	Keep Objective	Raise Objective	Score
	x		0.90

2) Frequency of risk plan review: Key members of the project team, including sponsors, engage in a review of risks and potential response and mitigation strategies on a monthly or more frequent basis.

Lower Objective	Keep Objective	Raise Objective	Score
	x		0.90

Overall Scoring of the *Risk Detail* Worksheet

The Total Overall score for the Risk Detail worksheet used on the dashboard is derived by taking the average of the Objective Score and the Subjective Score i.e. ((Subjective Score + Objective Score) / 2).

The Objective Score is calculated as:

1. If the approved risk management plan indicator box is filled with an 'x' the Objective Score is the calculated Status Test Score,
2. Else the Objective Score equals the Status Test Score minus 0.10.

The Subjective Score is the average of the two subjective scores from the previous section.

The Total Overall score is referenced by the Risk Health Indicator section on the 'Dashboard p1' worksheet to be the Current Health Rating. The diagram below illustrates this score.

Please check this box if using an approved risk management plan:	x

Summary of Schedule Score:	
Subjective score summary:	90.00%
Objective score summary:	90.00%
Total Overall Score:	90.00%

Explanation of the Risk Dashboard Health Indicator Section

The Risk Health Indicator section is located on the Dashboard page 1 worksheet. It contains two sections, the first is the health score, the second is the comments section.

The health score section is divided into three areas; the Previous Health rating, the Current health rating, and the Risk Score. The Previous health rating is controlled by the project manager and should be updated before updating the Risk Detail worksheet by keying in the health indicator of the Current section (Green, Yellow, or Red). The Current health rating is determined by the overall health score from the Risk Detail worksheet. If that score is less than .80 the field is filled in red and the word "Red" appears in the field. If the value is between .80 and .89 the indicator is "Yellow", and if the value is .90 or higher the indicator is "Green". The Risk Score section is the 'Risk Score' indicator from the Risk Detail worksheet and indicates the amount of risk carried by the project. A number less than one indicates behind schedule, one indicates on schedule, and greater than one indicates ahead of schedule. A table is provided below to give an understanding of the scoring in relation to the stop-light indicators.

The Comments area of the Health Indicator section is free form text to be updated by the project manager. The words "Comments" can be overwritten if desired. This area is where the project manager should comment on the status of the Category 1 risks or any risks that may turn to issues without immediate attention. This area is meant to be brief and factual, discussing items that the governance body will need to know.

The Risk Health Indicator Section of the dashboard is depicted in the diagram below.

Green (0.90 - 1.00)
Yellow (0.80 - 0.89)
Red (0.00 - 0.80)

RISK		
Previous	Current	Score
N/A	Green	0.67
Comments:		

Green (0.83 - 1.00)
Yellow (0.47 - 0.83)
Red (0.00 - 0.47)

PRACTICES GUIDE PM DASHBOARD - ISSUE DETAIL WORKSHEET

Version Number: 1.0

Version Date: 01/01/2011

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Practices Guide – Issue Detail Worksheet

Introduction to the *Issue Detail* Worksheet

Issue Management during the life of the project becomes an essential part of the execution phase. It is important for the project manager, business owner, and governance bodies to understand the items and events that are causing immediate impact to the ability of the project to meet its objectives. Issues must be identified, prioritized, and resolved in a timely manner to avoid catastrophic results. To accomplish this various metrics have been established in the worksheet. These metrics can assist the project manager in determining where resources need to placed to bring the project back to a sound footing. The issue metrics then become a guide by which the project team and governance body can determine if the project objectives are in danger of being missed or achieved. Therefore there becomes a need to monitor and measure the issue management data of the project.

The *Issue Detail* worksheet contains pertinent data regarding the issues of the project that allows for the objective measurement of the issue management practices of the project during its lifecycle. This Practices Guide will discuss the four major sections of the worksheet and explain how to complete them and evaluate the metrics as they relate to the overall health rating of the project.

The four sections cover the Issue Data, the Issue Status Checking data fields, the objective scoring of the worksheet, and the methods used to evaluate the subjective scoring of the worksheet.

Explanation of the *Issue Detail* Data Fields

This section explains the issue data fields for the project work effort and the valid data that should be keyed into each field. These fields are used to evaluate and measure the health of the issue management practice and are required entry fields.

Issue Data

These fields are used to assist the project manager track and measure the progress of the projects issues.

The table below describes each field and how it is used. The values in this section are used in the objective scoring of issue management and will be explained in the Objective Scoring section later in this document.

Field Name	Description
Issue Number	Optional. This is a user defined identifier for the issue.
Issue Description	Required. This field describes the issue that is having an immediate impact to the project.
Due Date	Required. The date the issue is to be resolved. Use mm/dd/yy format.
Actual Finish Date	Required. The date the issue was resolved via acceptance by the business owner. Use mm/dd/yy format.
Priority	Required. The importance of this issue. Valid values are blanks, ‘High’, ‘Medium’, or ‘Low’ only.

An example of this data is displayed below.

Issue Number	**Issue Description**	**Due Date**	**Actual Finish Date**	**Priority**
	Issue Description	12/10/10	12/17/10	High

Issue Status Checking Data

All of these fields are calculated based upon data entered from the prior section and should not be altered. Using information entered into the 'Due Date', 'Actual Finish Date', and 'Priority' one of the fields is flagged with a 1 (the condition is met), otherwise a 0 (condition not met) is placed in the field.

The values in these fields are used in the determination of the objective scoring of the issue management practice and will be explained in the Objective Scoring section later in this document. The table below describes each field and how it is derived.

Field Name	Description
High On Time	If the priority is 'High' continue, otherwise place a 0 in the field and skip. If the Actual Finish Date exists: If the Actual Finish Date is less than or equal to 7 calendar days from the Due Date a 1 is placed in the field (on-time), otherwise place a 0 in the field (not on-time). Else, [Issue not resolved] If the As Of Date is less than the Due Date a 1 is placed in the field (on-time), otherwise a 0 (not on-time) is placed in the field.
High Late	If the priority is 'High' continue, otherwise place a 0 in the field and skip. If the Actual Finish Date does not exist: If the As Of Date is greater than the Due Date a 1 is placed in the field (late), otherwise place a 0 in the field (not late). Else, [Issue resolved] If the Actual Finish Date is greater than 7 calendar days from the Due Date a 1 is placed in the field (late), otherwise a 0 (not late) is placed in the field.
Medium On Time	If the priority is 'Medium' continue, otherwise place a 0 in the field and skip. If the Actual Finish Date exists: If the Due Date is greater than or equal to the Actual Finish Date a 1 is placed in the field (on-time), otherwise place a 0 in the field (not on-time). Else, [Issue not resolved] If the As Of Date is less than the Due Date a 1 is placed in the field (on-time), otherwise a 0 (not on-time) is placed in the field.
Medium Late	If the priority is 'Medium' continue, otherwise place a 0 in the field and skip. If the Actual Finish Date does not exist: If the As Of Date is greater than the Due Date a 1 is placed in the field (late), otherwise place a 0 in the field (not late). Else, [Issue resolved] If the Actual Finish Date is greater than the Due Date a 1 is placed in the field (late), otherwise a 0 (not late) is placed in the field.

Practices Guide – Issue Detail Worksheet

Field Name	Description
Low On Time	If the priority is 'Low' continue, otherwise place a 0 in the field and skip. If the Actual Finish Date exists: If the Due Date is greater than or equal to the Actual Finish Date a 1 is placed in the field (on-time), otherwise place a 0 in the field (not on-time). Else, [Issue not resolved] If the As Of Date is less than the Due Date a 1 is placed in the field (on-time), otherwise a 0 (not on-time) is placed in the field.
Low Late	If the priority is 'Low' continue, otherwise place a 0 in the field and skip. If the Actual Finish Date does not exist: If the As Of Date is greater than the Due Date a 1 is placed in the field (late), otherwise place a 0 in the field (not late). Else, [Issue resolved] If the Actual Finish Date is greater than the Due Date a 1 is placed in the field (late), otherwise a 0 (not late) is placed in the field.

An example of this data is displayed below.

Counts for Status Check					
High On Time	High Late	Medium On Time	Medium Late	Low On Time	Low Late
1	0	0	0	0	0

Objective Scoring of the *Issue Detail* Worksheet

The Issue Detail worksheet is measured and given a health rating based upon several criteria described in the list below. The metrics are derived from the Issue Status Checking Data section. The sequences below describe each metric and how it contributes to the overall objective score for issue management.

Please refer to the diagrams below as you read through the sequences.

High On Time	High Late	Medium On Time	Medium Late	Low On Time	Low Late
1	0	0	0	0	0

% High Complete	100%	Green
% Medium Complete	n/a	Green
% Low Complete	n/a	Green

Status Test 1:	Green	All Three Green
Status Test 2:	No Reds	Any Reds
Status Test 3:	1	Final Status

Percent Complete Scoring

1. **% High Complete:** If the sum of the High On-Time and Late are equal to 0 the result is 'n/a', otherwise the High On-Time value is divided by the sum of the High On-Time and High Late, giving a ratio of On-Time to Total. If the result is 'n/a' or 1 a value of 'Green' is awarded. If the result is less than 1 but greater than or equal to .95 a value of 'Yellow' is awarded. If the value is less than .95 a value of 'Red' is awarded.
2. **% Medium Complete:** If the sum of the Medium On-Time and Late are equal to 0 the result is 'n/a', otherwise the Medium On-Time value is divided by the sum of the Medium On-Time and Medium Late, giving a ratio of On-Time to Total. If the result is greater than or equal to.90 a value of 'Green' is awarded. If the result is less than .90 but greater than or equal to .85 a value of 'Yellow' is awarded. If the value is less than .85 a value of 'Red' is awarded.
3. **% Low Complete:** If the sum of the Low On-Time and Late are equal to 0 the result is 'n/a', otherwise the Low On-Time value is divided by the sum of the Low On-Time and Low Late, giving a ratio of On-Time to Total. If the result is greater than or equal to.80 a value of 'Green' is awarded. If the result is less than .80 but greater than or equal to .75 a value of 'Yellow' is awarded. If the value is less than .75 a value of 'Red' is awarded.

Status Test Scoring

1. **Status Test 1 (All Three Green):**
   If ALL the Percent Complete statuses are 'Green' the result is 'Green',
   else the result is 'Failed'.
2. **Status Test 2 (Any Reds):**
   If Status Test 1 equals 'Failed' continue the test,
   else the result is 'No Reds' and skip to the last test.
   If the '% High Complete' value is 'Red' the result is 'Red',
   else if the '% Medium' value is 'Red' the result is 'Red',
   else the result is 'No Reds'.
3. **Status Test 3:**
   If Status Test 1 is equal to 'Green' the result is 1,
   else if Status Test 2 equals 'No Reds' the result is 0.80,
   else the result is 0.79.

The results of Status Test 3 are used in the calculation of the overall objective score for the Issue Detail worksheet as seen in the diagram below. The final objective rating is derived by looking at the response to the question about the use of an issue tracking system. If an issue tracking system is not used the Status Test 3 score is reduced by 0.11 points to arrive at the final objective score.

Practices Guide – Issue Detail Worksheet

Subjective Scoring of the *Issue Detail* Worksheet

As in each of the worksheets in the PM Dashboard, the Issue Detail worksheet has a subjective scoring section. This allows the project manager to raise or lower the overall health score by identifying compliance to two items.

The first item measures whether issues and corrective actions are documented using an approved issue tracking system.

The second item measures whether due dates for issues are valid and resources are assigned to all issues.

The subjective scoring section works in the following manner. An average of the two scores is taken and used as the overall subjective score. A decrease or increase in the subjective score will change the overall health score of the Issues Detail worksheet. To decrease a subjective score place an 'x' in the "Lower Objective" field. Do the same to the "Raise Objective" field to increase the subjective score. Also, make sure you delete the 'x' from the field you are not using. To drive the subjective score to "Red" you can blank out all the subjective scoring fields.

Please only fill-in cells highlighted in ORANGE.

Scored items: Please put an "X" below the response that best describes your answer. Please mark only ONE ANSWER per question.

1) Issues and corrective actions are documented using an approved issue tracking system.

Lower Objective	Keep Objective	Raise Objective	Score
	x		1.00

2) Due dates are valid and resources are assigned for all issues.

Lower Objective	Keep Objective	Raise Objective	Score
	x		1.00

Practices Guide – Issue Detail Worksheet

Overall Scoring of the *Issue Detail* Worksheet

The Total Overall score for the Issue Detail worksheet used on the dashboard is derived by taking the average of the Objective Score and the Subjective Score i.e. ((Subjective Score + Objective Score) / 2).

The Objective Score is calculated as:

1. If the approved issues tracking system used indicator box is filled with an 'x' the Objective Score is the calculated Status Test Score,
2. Else the Objective Score equals the Status Test Score minus 0.11.

The Subjective Score is the average of the two subjective scores from the previous section.

The Total Overall score is referenced by the Issue Health Indicator section on the 'Dashboard p1' worksheet to be the Current Health Rating. The diagram below illustrates this score.

Please check this box if using an approved issue tracking system:	**x**

Summary of Schedule Score:	
Subjective score summary:	100.00%
Objective score summary:	100.00%
Total Overall Score:	100.00%

Practices Guide – Issue Detail Worksheet

Explanation of the Issues Dashboard Health Indicator Section

The Issues Health Indicator section is located on the Dashboard page 1 worksheet. It contains two sections, the first is the health score, the second is the comments section.

The health score section is divided into three areas; the Previous Health rating, the Current health rating, and the Trend Indicator. The Previous health rating is controlled by the project manager and should be updated before updating the Issue Detail worksheet by keying in the health indicator of the Current section (Green, Yellow, or Red). The Current health rating is determined by the overall health score from the Issue Detail worksheet. If that score is less than .80 the field is filled in red and the word "Red" appears in the field. If the value is between .80 and .89 the indicator is "Yellow", and if the value is .90 or higher the indicator is "Green". The Trend Indicator is the direction the project manager thinks the health of issue management is heading in. A table is provided below to give an understanding of the scoring in relation to the stop-light indicators and trend indicators.

The Comments area of the Health Indicator section is free form text to be updated by the project manager. The words "Comments" can be overwritten if desired. This area is where the project manager should comment on any issues that are not getting resolved and are now impacting the health of the project. This area is meant to be brief and factual, discussing items that the governance body will need to know.

The Issues Health Indicator Section of the dashboard is depicted in the diagram below.

ISSUES		
Previous	Current	Trend
N/A	**Green**	**N/C**
Comments:		

Green (0.90 - 1.00)
Yellow (0.80 - 0.89)
Red (0.00 - 0.80)

Trend Indicators:
+ = Improving
- = Declining
N/C = No Change

PRACTICES GUIDE PM DASHBOARD - ORG READINESS DETAIL WORKSHEET

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Practices Guide – Org Readiness Detail Worksheet

Introduction to the *Org Readiness Detail* Worksheet

Organizational Readiness is instrumental in preparing the organization to receive the results of the project effort. Most projects are able to deliver the scope that was planned for and often do so on time and on budget. Where project teams fall short is when they deliver a product or service the organization either was unaware was coming or does not know how to use.

Best practices call for the development of checklists and metrics to inform the project manger, stakeholders, and governance bodies of the organizations preparedness to take on the change being instituted by the project effort. The checklists can also assist the project manager in the planning stages of the project to determine actions that can be taken to assure the organization has done all that it can do to be ready for the project deliverables when they arrive.

The *Org Readiness Detail* worksheet contains a series of such checklists that allow for the objective measurement of the preparedness of the organization during the projects lifecycle. This Practices Guide will discuss the three major sections of the worksheet and explain how to complete them and evaluate the metrics as they relate to the overall health rating of the project.

The three sections cover the checklist data, the objective scoring of the worksheet, and the methods used to evaluate the subjective scoring of the worksheet.

Practices Guide – Org Readiness Detail Worksheet

Explanation of the *Org Readiness Detail* Checklist Fields

This section explains the readiness checklists and the valid data that should be keyed into each field. These fields are used to evaluate and measure the health of the organizational readiness and are required entry fields.

General Format of the Checklists

Each section is formatted the same. This document will first explain the formatting of the checklists and how to complete it then the checklist sections will be displayed. The diagram below depicts the basic layout of each assessment section. The table below the diagram will explain each element and its usage. The Assessment Topics and Key Phase(s) columns are pre-loaded and static. The Scores column is pre-loaded with the 'N/A' value but should be updated when appropriate with a score. The tables following this section are for demonstration purposes and reflect the project being in the planning phase.

Assessment Areas/Assessment Topics/Actions To Date		Key Phase(s)	Scores	Comments
A. Communications Readiness				
1) Employees understand the purpose of the project		All	NA	
	Area Average			

Field Name	Description
Assessment Topic	These are the questions that should be answered. Not to be altered.
Actions To Date	Optional. Any actions assigned for this topic.
Key Phase(s)	The Project Phase when this question should be answered.
Scores	The score given for the question (see table below).
Comments	Optional. Any comments regarding the ability to fulfill the topic.
Area Average	The average score for the area. Values of 'N/A' are not included.

3 - Ready
2 - Some Concerns
1 - Big Issues
NA - Not Yet Applicable

Practices Guide – Org Readiness Detail Worksheet

Communication Readiness

This section evaluates the communications effort being conducted with the users, customers, and others regarding the changes to be delivered to the organization.

Assessment Areas/Assessment Topics/Actions To Date	Key Phase(s)	Scores	Comments
A. Communications Readiness			
1) Employees understand the purpose of the project	All	3	
2) Employees know where to go for information about the project	Init, All	2	
3) Employee knows when project is going live	Exec	NA	
4) Employees know what project is	All	2	
5) Employees know that legacy will no longer be used after go-live	All	3	
6) Process and procedural changes have been communicated to the organization	Exec	NA	
7) Departments and employees know how project will impact their organization	Plan	2	
8) External customers and vendors understand how project will impact them	Plan	3	
9) Other communications barriers or risks (free form comments)			
	Area Average	2.5	

Training Readiness

This section evaluates the training effort being conducted with the users, customers, and others regarding the changes to be delivered to the organization.

Assessment Areas/Assessment Topics/Actions To Date	Key Phase(s)	Scores	Comments
B. Training Readiness			
1) The enrollment process for training is understood	Exec	NA	
2) Training curriculum has been communicated to employees	Exec	NA	
3) Employees requiring classroom training have completed any required prerequisite training	Exec	NA	
4) Employees know where to go and when to attend training	Exec	NA	
5) Instructors have been identified and are prepared to deliver training	Exec	NA	
6) Instructors "regular" job responsibilities have been reduced to accommodate added instructor responsibilities	Exec	NA	
7) Training facilities have been identified and are ready for training delivery	Exec	NA	
8) Employees have received necessary prerequisite skills training for jobs for which responsibilities have changed	Exec	NA	
9) Other training barriers or risks (free form comments)			
	Area Average		

Practices Guide – Org Readiness Detail Worksheet

Organization Alignment Readiness

This section evaluates the organizational alignment effort being conducted with the users, customers, and others regarding the changes to be delivered to the organization.

Assessment Areas/Assessment Topics/Actions To Date	Key Phase(s)	Scores	Comments
C. Organization Alignment Readiness			
1) Department managers have added required new headcount	Exec	NA	
2) Jobs which have changed have had job descriptions modified and communicated	Exec	NA	
3) Department managers have addressed eliminated job functions	Exec	NA	
4) Department managers have redeployed employees who have been identified to move from one job to another	Exec	NA	
5) Other organization alignment barriers or risks (free form comments)			
	Area Average		

Technical/Cutover Readiness

This section evaluates the organizational alignment effort being conducted with the users, customers, and others regarding the changes to be delivered to the organization.

Assessment Areas/Assessment Topics/Actions To Date	Key Phase(s)	Scores	Comments
D. Technical/Cutover Readiness			
1) All employees who will need access to new system have been identified	Exec	NA	
2) User IDs and passwords have been identified and assigned to all end users in the production system	Exec	NA	
3) Detailed procedures have been established for cutting over from old processes and systems to new system/processes	Exec	NA	
4) Assigned individuals have reviewed, practiced, and are able to execute detailed cutover procedures.	Exec	NA	
5) New system has been installed and tested on employee computers	Exec	NA	
6) Other supporting software has been installed and tested on employee computers	Exec	NA	
7) Other technical/cutover barriers or risks (free form comments)			
	Area Average		

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Practices Guide – Org Readiness Detail Worksheet

Post-Implementation Support Readiness

This section evaluates the organizational alignment effort being conducted with the users, customers, and others regarding the changes to be delivered to the organization.

Assessment Areas/Assessment Topics/Actions To Date	Key Phase(s)	Scores	Comments
E. Post-Implementation Support Readiness			
1) Superusers have been identified from each department	Plan	3	
2) Superusers understand and agree to their responsibilities as instructors and/or first-line-of-support resources	Plan	2	
3) Superusers "regular" job responsibilities have been reduced to accommodate added superuser responsibilities	Exec	NA	
4) iTutor/CBT/etc. has been deployed to employee computers and been tested	Exec	NA	
5) Employees know how to get help with new system functional questions and process changes after go-live	Exec	NA	
6) Employees know how to get technical help with new system after go-live	Exec	NA	
7) Other post-implementation support barriers or risks (free form comments)			
	Area Average	**2.5**	

Objective Scoring of the *Org Readiness Detail* Worksheet

The Org Readiness Detail worksheet is measured and given a health rating based upon the criteria described in the list below. The metrics are derived from the answers provided in the Assessment Area checklists. The sequences below describe each metric and how it contributes to the overall objective score for the budget.

The Overall Average score is derived as follows:

1. An average score is derived in each assessment area based on the scores provided for each assessment topic.
2. If all topics evaluate as 'NA' the Overall Average is 'NA', otherwise the averages of the Assessment Areas are averaged and the result is the Overall Average.

Assessment Areas/Assessment Topics/Actions To Date	Key Phase(s)	Scores	Comments
A. Communications Readiness			
	Area Average	**2.5**	
B. Training Readiness			
	Area Average		
C. Organization Alignment Readiness			
	Area Average		
D. Technical/Cutover Readiness			
	Area Average		
E. Post-Implementation Support Readiness			
	Area Average	**2.5**	
	Overall Average:	**2.5**	

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Subjective Scoring of the *Org Readiness Detail* Worksheet

As in each of the worksheets in the PM Dashboard, the Org Readiness Detail worksheet has a subjective scoring section. This allows the project manager to raise or lower the overall health score by identifying compliance to two items.

The first item measures whether the project manager is maintaining a communications plan..

The second item measures whether appropriate communications are occurring through the proper channels and at the appropriate times.

The subjective scoring section works in the following manner. An average of the two scores is taken and used as the overall subjective score. A decrease or increase in the subjective score will change the overall health score of the Org Readiness Detail worksheet. To decrease a subjective score place an 'x' in the "Lower Objective" field. Do the same to the "Raise Objective" field to increase the subjective score. Also, make sure you delete the 'x' from the field you are not using. To drive the subjective score to "Red" you can blank out all the subjective scoring fields.

Please only fill-in cells highlighted in ORANGE.

Scored items: Please put an "X" below the response that best describes your answer. Please mark only ONE ANSWER per question.

1) Communications Plan: The project maintains a communications plan, which includes all project stakeholders, key communication needs, frequency/timing of communications, and communications method/vehicle (email, meeting, etc.) to achieve desired results.

Lower Objective	Keep Objective	Raise Objective	Score
	x		0.90

2) Ongoing communication occurs through the proper channels/methods and with the planned frequency (project presentations, performance reporting, etc.).

Lower Objective	Keep Objective	Raise Objective	Score
	x		0.90

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Overall Scoring of the *Org Readiness Detail* Worksheet

The Total Overall score for the Org Readiness Detail worksheet used on the dashboard is derived by taking the average of the Objective Score and the Subjective Score i.e. ((Subjective Score + Objective Score) / 2).

The Objective Score is calculated as:

1. The Objective Score is derived as follows;
    a. An Overall Average equal to 'NA' yields a score of 0.90
    b. An Overall Average less than 1.50 yields a score of 0.79 (Red)
    c. An Overall Average greater than 2.49 yields a score of 0.90 (Green),
    d. An Overall Average less than or equal to 2.49 and greater than or equal to 1.50 yields a score of 0.80 (Yellow).

The Subjective Score is the average of the two subjective scores from the previous section.

The Total Overall score is referenced by the Org Readiness Health Indicator section on the 'Dashboard p1' worksheet to be the Current Health Rating. The diagram below illustrates this score.

Summary of Schedule Score:		
Subjective score summary:		90.00%
Objective score summary:		90.00%
Total Overall Score:		90.00%

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Explanation of the Org Readiness Dashboard Health Indicator Section

The Org Readiness Health Indicator section is located on the Dashboard page 1 worksheet. It contains two sections, the first is the health score, the second is the comments section.

The health score section is divided into three areas; the Previous Health rating, the Current health rating, and the Trend Indicator. The Previous health rating is controlled by the project manager and should be updated before updating the Org Readiness Detail worksheet by keying in the health indicator of the Current section (Green, Yellow, or Red). The Current health rating is determined by the overall health score from the Org Readiness Detail worksheet. If that score is less than .80 the field is filled in red and the word "Red" appears in the field. If the value is between .80 and .89 the indicator is "Yellow", and if the value is .90 or higher the indicator is "Green". The Trend Indicator is the direction the project manager thinks the health of the readiness effort is heading. A table is provided below to give an understanding of the scoring in relation to the stop-light indicators and trend indicators.

The Comments area of the Health Indicator section is free form text to be updated by the project manager. The words "Comments" can be overwritten if desired. This area is where the project manager should comment on any risks or issues related to the readiness. This could include things like the training, cutover and transition planning, some internal or external factor that might impact readiness. This area is meant to be brief and factual, discussing items that the governance body will need to know.

The Org Readiness Health Indicator Section of the dashboard is depicted in the diagram below.

ORG. READINESS		
Previous	Current	Trend
N/A	Green	N/C
Comments:		

Green (0.90 - 1.00)
Yellow (0.80 - 0.89)
Red (0.00 - 0.80)

Trend Indicators:
+ = Improving
- = Declining
N/C = No Change