

Report

What is a Report and what is its purpose

Reporting is the main way of receiving information about projects. **Key information on project status and its expected development** is collated in a report.

When is the report prepared

Reporting forms must be prepared no later than at the time of launching the implementation phase of project management. Regular reports are prepared at suitable intervals that are determined adequately to reflect the length of the project and its activities. If activities are carried out over a couple of days, it is necessary to report even twice a week, if activities are carried out over a couple of weeks, it is sufficient to report once a week, and if activities are carried out over a couple of months (however this is not advisable), a report can be made twice or once a month.

A report is used as a source of information by people outside the project team (e.g. for the steering committee or organisation management). It is known that there are monitoring reports prepared for EU projects that inform the contracting authority about project progress every quarter or six months. In any case it is important to set up regular reporting.

Who participates in the preparation of reports

A report is prepared by the **project manager**, or an authorised person, for people outside the project team (e.g. the steering committee or organisation management), or a report can be modified and used to pass information within the project team, e.g. in the case of dividing a more complex project into several individual parts - in this case reporting is done by the **persons who are responsible for the individual parts** and who answer to the project manager.

When is the document used

A report is mainly used during the **implementation phase** of project management.

Process of preparing the document

- The project is first marked with relevant **identification features**. These are only stated once and it is not expected that they will be changed; they are used, in particular, to distinguish between individual projects. For the sake of clarity, this basic classification is expanded and the project objectives, project outputs required and basic phases of the project are added.
- The **actual report** follows. The introductory part identifies the period for which the report is prepared and the current phase of the project.
- This is followed by the activities completed in the reported period, all activities that are currently in progress, and any activities which should start to be implemented in the next reporting period.
- The section on human resources states the person-days consumption per individual members of staff and what the outlook (requirements) is like for the coming period.
- The budget use is stated for the last reported period (the original plan for the given period is shown in brackets) and the overall project tolerance is shown (for the sake of clarity).
- In its conclusion the report addresses issues which could disrupt the project in the coming period and states issues for the steering committee - the steering committee might or might not have to address certain issues.

- **The author of the document identifies themselves** at the bottom of the document.
- The contracting authority may stipulate its own requirements for Regular Reporting.

Example of a completed form

Basic data	
Project name:	Development of student language skills
Project identification number:	OPXY/XX/10/XX
Purpose:	To improve graduate skills; To increase the number of students interested in studying at our school;
Project objective:	The language skills of our students will have increased by the end of XY.
Project outputs:	<ol style="list-style-type: none"> 1) Multi-media language classroom 2) 3 stays abroad for 20 students 3) Internships abroad for 10 teachers 4) Preparatory courses for 60 students for certification exams 5) 4 modules in linguistics for teachers
Project phases:	<ol style="list-style-type: none"> 1) Tendering process 2) Preparing the classroom 3) Teacher training 4) Student training 5) Certification
Actual report	
Report for the period of:	15/11/YYYY to 22/11/YYYY
Current project phase:	Preparing the classroom
Work completed in the reported period:	<ul style="list-style-type: none"> • Old plaster has been chipped away • Basic wiring has been done
In-progress:	<ul style="list-style-type: none"> • More advanced wiring • Plastering
Plan of activities for coming periods;	<ul style="list-style-type: none"> • Painting
Consumption of human resources:	<ul style="list-style-type: none"> • Mgr. Vopršálek - 0.5 person-days • Mgr. Němec - 2 person-days
Resources required for the next period:	<ul style="list-style-type: none"> • Mgr. Vopršálek - 1 person/day • Mgr. Němec - 1 person/day
Budget use (plan):	CZK 233,254 (230,000)
Total budget tolerance:	- CZK 12,548
Problems and critical factors:	<ul style="list-style-type: none"> • Some work has become more expensive compared to the original estimates - a fixed price must be arranged with workmen. • The plaster on one of the walls is flaking off which may have to be repaired and will represent extra work compared to the approved budget.
Issues presented to the steering committee:	Transferring finance from a different budget chapter to pay for differences or potential extra work.

Created by	
Created on: 22/11/YYYY	
Author:	Signature
Mgr. Němec, project manager	

