



Greater Bristol Bus Network

Annex J

Quarterly Progress Report Template

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Revision	Purpose Description	ATKINS				



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J.1. GBBN Quarter (Dates)

J.1.1 This report covers the progress made on the GBBN project in the last quarter (dates to be added).

GENERAL OVERVIEW

J.1.2 *Brief introduction text to give an overview of activities etc.*



J.2. Progress Against Planned

J.2.1 The IPD will use the Task Order Tracker to review progress of all tasks assigned to each partner. Table J-1 will be reviewed in detail. Issues or request for change will be documented in more detail in sections three, four and five of the Quarterly Report.

Table J-1 – Summary of Progress by Task

Task No	Type	Description	Planned Start Date	Planned End Date	Current Spend	% Complete	Comments (including summary of stage e.g. design, consultation, TRO, construction)
3003	Bus Priority	<i>Text</i>	<i>Text</i>	<i>Text</i>	<i>Text</i>	%	<i>Text</i>



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J.3. Procurement Activities

- J.3.1 In this section the IPD and Project Manager will review the procurement status of each scheme element in Table J-1.
- J.3.2 This includes review of formal procurement activities as set out in Chapter 6 of the Full Approval MSBC and also the appointed CDM and contractors for the scheme elements to be let under schedule of rates contracts.

Table J-2 – Procurement Activities for Each GBBN Partner

Task Order	Procurement Route	Start Date	End Date	Tender Stage	CDM		Contractor	
					Appointed	Date	Yes/No	Date
<i>Insert No</i>	<i>Schedule of Rates (s)</i>			<i>Pending (p)</i>	<i>Yes/No</i>	<i>Date</i>	<i>Yes/No</i>	<i>Date</i>
	<i>Call off contract (C)</i>			<i>Advertised (Ad)</i>	<i>N/A</i>		<i>N/A</i>	
	<i>Tendering (T)</i>			<i>Appointed (Ap)</i>				



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J.5. Review of Risks

- J.5.1 In this section the IPD will formally review all the risks for which the Project Manager is responsible, or for those which others within their organisation are the risk owner.
- J.5.2 The Quarterly Report will be the mechanism for updating on progress. Changes to risks will be reported to the next GBBN Programme Board meeting. The weekly meeting will also be the mechanism for capturing new risks.

Table 4 – Risked Owned by (INSERT GBBN Partner Name)

Risk No	Category	Date Identified	Description	Proximity	Update – to likelihood, mitigation, risk (decrease/increase), other factors	Status

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J.6. Changes to a Partner’s Work Package

- J.6.1 In this section the IPD will review with Project Managers progress on requests made (in terms of authorisation, exception reports, rejections).
- J.6.2 This section of the report will be used to capture any further requests for change linked to information contained in Table J-1 and Table J-2.
- J.6.3 The updated register of partner requests for Change will be made to Table J-3. For each item listed in Table J-3 the GBBN Request for Change Form must have been completed and submitted to the IPD.

Table J-5 – Summary of Requests for Change

Task Order	Version Number	Date of Request	Current Start Date	Proposed Start Date	Current End Date	Proposed End Date	Current Budget	Proposed Budget	Authorisation Required	Status (Open/closed)
3003										

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REQUESTS FROM CHANGES THAT EXCEED AUTHORISATIONS

- J.6.4 If, at any time, a programme partner wishes to transfer funding between tasks outside of the delegations set out in the Programme Handbook it will require an Exception Report to be prepared by the IPD in conjunction with the relevant project manager.
- J.6.5 This section should set out details of any proposed changes.

REQUEST FOR ADDITIONAL FUNDING FROM GBBN CHANGE BUDGET

- J.6.6 This section of the weekly report will be used to set out any proposed requests for funding from the GBBN Change budget.
- J.6.7 To instigate a request for additional funding a Programme Issue will need to have been raised with the IPD. The IPD will assess the issue with the SRO and, where appropriate, the IPD will be instructed to prepare an Exception Report in conjunction with the relevant project manager. The authority required to approve the additional resources depends on the amount of funding requested in line with the delegations set out in the Programme Handbook.

CHANGES TO TASK ORDERS

- J.6.8 This section will set out any proposed changes to task orders. In line with the Programme Handbook these will be categorised as 'minor' and 'major' changes.
- J.6.9 Minor changes will be signed off at the next Programme Board. Any Major Changes will require an Exception Report to be prepared and submitted to the IPD.

MAJOR CHANGE

- J.6.10 This section will summarise any issues that have arisen that constitute a major change. These issues will then be dealt with in line with the procedures set out in the Programme Handbook.

J.7. Exception Reports and Plans

- J.7.1 In this section the project manager will summarise any Exception Reports (awaiting approval) and progress against any approved Exception Plans.
- J.7.2 It will summarise any further Exception Reports that are required as a consequence of the information within this report.



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J.8. Cost Claims

J.8.1 This section will include information to confirm status of quarterly cost claims. It will briefly summarise when received, any issues with information submitted.

J.9. Key Actions

J.9.1 The weekly report will conclude the key actions agreed at the meeting. All the key actions should be listed in the Weekly Log – this section will just summarise the key actions that need to be undertaken in the next seven days prior to the next weekly meeting.

J.9.2 It will also summarise the issues that are to be raised with the SRO and Programme Board.

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J.10. Work Package RAG Score

- J.10.1 Based on the performance each Quarterly Report will include a Red/Amber/Green rating of the Partner’s performance.
- J.10.2 The rating will be provided by the IPD in consultation with the GBBN Project Manager. The criteria in the table below are not exhaustive and meant as a guide to the overall rating.
- J.10.3 The purpose of the RAG score is to provide focus for the IPD, SRO and GBBN Programme Board members at their meetings.
- J.10.4 Partners with Amber or Red ratings will need close scrutiny of Stage Plans Exception Reports, Exception Plans, Change and Risk decisions.

Rating	Criteria
Green	<ul style="list-style-type: none"> ◆ Tasks remain on track in line with Task Orders ◆ No Exception Reports or Exception Plans ◆ Spend is on track ◆ Procurement completed as planned
Amber	<ul style="list-style-type: none"> ◆ Requests for Changes have been made but await approval ◆ Exception Plans in place but remain on track ◆ Spend or timescale divergences not reported in advance on more than one instance ◆ New issue or risk that requires guidance from GBBN Programme Board
Red	<ul style="list-style-type: none"> ◆ Major change to work package required ◆ Issues exceed change controls in Programme Handbook



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	<ul style="list-style-type: none">◆ Significant divergence from planned activities◆ Divergence from approved Exception Plan(s)◆ Significant new risk or escalation of existing risk
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J.11. Key Items for GBBN Programme Boards

J.11.1 In this Section the IPD and Project Manager will agree the key items for consideration at the next GBBN Programme Board. The key items will highlight the progress, issues and risks identified in the Report.