**Data Item Description**

**Progress Report**

**PM261**

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| **Progress Report** | **PM261** |

**Purpose**

The Progress Report is intended to make the Subcontracting Authority aware of the Supplier’s progress of the Work against the Supplier’s Level 0 Schedule (see Schedule F), and Supplier’s Master Schedule (***SMS*** – see SDRL PM251 and DID PM251) as applicable. Each Progress Report is intended to be a formal, contractually significant tool to provide an objective, accurate, candid, truthful and comprehensive report as to its progress of the Work current in all respects at the time of preparation.

The Progress Report is in a *pro forma* template so as to permit consistency and ease of ‘backward reference’ to earlier Progress Reports. However, if the Supplier is of the opinion that the *pro forma* template precludes an objective, accurate, candid and truthful report as to progress of the Work being declared, then the Supplier shall add whatever additional sections to the end of the report that is considered necessary.

**References**

This DID must be read in conjunction with Schedule A (General Conditions) and the corresponding SOW reference.

**Preparation Instructions**

This Data Item shall comply with the general format, content and preparation instructions set out in Part 1 (Introduction) and Part 2 (Project Management) of the SOW.

**Format and Content**

1 The Progress Report shall contain the following information in the following structure:

**Section 0. Executive Summary**

[\* insert text]

**Section 1. Introduction**

This section shall provide an introduction identifying the following:

1. Agreement number: [\*]
2. Amendment number (if any): [\*]
3. Covering Purchase Order #: [\*]
4. Description of the System: [\*]
5. Description of the Equipment: [\*]
6. Purchaser’s SWBS #: [\*]
7. Change in Price since Contract Award +/-: [\*]
8. Narrative for Section 1, including a summary of progress since the last Progress Report and planned progress until the next Progress Report.

[\* insert text]

**Section 2. Commercial**

This section shall identify the following:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| a. | Outstanding Change Orders: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| b. | Outstanding Change Order Request: | Nos: | [\*] | Dates | DDMMMYY | Description: | [\*] |
| c. | Directions from Purchaser: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| d. | Notices of Default: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| e. | Recovery Plans: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| f. | Disputes: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| g. | Claims against the Purchaser: | Y/N | [\*] | Identify: | DDMMMYY | Description: | [\*] |
| h. | Warranty claims: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| i. | Anticipated Defaults: | [\*] | | | | | |
| j. | Narrative for Section 2 | | | | | | |
| [\*insert text] | | | | | | | |

**Section 3. Financial**

This section shall identify the following:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| a. | Payments made to date: | Planned: | $ | [\*] | Actual: | $ | [\*] |
| b. | Payments claimed but not paid: |  | $ | [\*] | Dates: |  | DDMMMYY |
| c. | Claim forecast for next six (6) Months: |  | $ | [\*] |  |  |  |
| d. | Narrative for Section 3 | | | | | | |
| [\* insert text] | | | | | | | |

**Section 4. Schedule**

This section shall identify the following:

|  |  |  |
| --- | --- | --- |
| a. | Revision level from Supplier's Level 0 Schedule: | Rev: [\*] |
| b. | Actual revision level of Supplier’s Level 0 Schedule being used: | Rev: [\*] | |
| c. | If Delivery Dates not met, list and provide forecast delivery dates: | Forecast Delivery Dates | |
|  | Equipment | DDMMMYY | |
|  | On Loan Items | DDMMMYY | |
|  | SPT | DDMMMYY | |
|  | Deliverable Software | DDMMMYY | |
|  | Data Items | DDMMMYY | |
|  | Services | DDMMMYY | |
| d. | List all Data Items to be delivered during the next six (6) Months: [\*] | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| e. | | | Planned Meetings (if any) to be held before delivery of next Progress Report: | | | | | | | | | | | | |
|  | | | Date(s): | DDMMMYY | | | Location(s): | | | [\*] | | | | | |
|  | | | Subject(s): | [\*] | | | | | | | | | | | |
| f. | | | Status of Recovery Plans: | | | | Nos: [\*] | | | Description: | | | [\*] | Forecast: | | DDMMMYY |
| g. | | | Milestones achieved to date: | | | | Nos: [\*] | | | Dates: DDMMMYY | | | | Forecast: DDMMMYY | | | |
| h. | | | Milestones missed to date: | | | | Nos: [\*] | | | Dates: DDMMMYY | | | | Forecast: DDMMMYY | | | |
| i. | | | Reason for Milestones not achieved: | | | | | | | | | | | | | | |
| j. | | | Narrative for Section 4:  [\* insert text] | | | | | | | | | | | | | | |

**Section 5. Meetings Held Since Last Progress Report**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date(s): | DDMMMYY | Location: | [\*] | Subject(s): | [\*] |

Action Item responses from Meetings: {\*]

Outstanding Action Items from Meetings: [\*]

Narrative for Section 5:

[\* insert text]

**Section 6. Attendance at the Purchaser’s Premises and/or Ship**

1. Tabulate and provide reasons for:
   * Number of man days attended at Purchaser’s premises/ship since CA: [\*]
   * Number of man days since last Progress Report: [\*]
   * Nature of Work performed at Purchaser’s premises/ship since last Progress Report: [\*]
   * Number of man-days planned at Purchaser’s premises/ship before next Progress Report: [\*]
2. Narrative for Section 6:

[\* insert text]

**Section 7. Engineering**

This is a narrative section to describe the status and forecast for completion of the technical Work.

1. List here all Design Reviews and Acceptance Events as required by the SOW, if any, and the status against each one.

[\*]

1. List here a brief summary of any ‘technical issues’ (if any) and (if available) potential solutions.

[\*]

**Section 8. Integrated Logistics Support (ILS) or Support**

This is a narrative section to describe the status and forecast for completion of the ILS or Support Work.

1. List here all formal reviews as required by the SOW, (if any) and the status against each one.

[\*]

1. List here a brief summary of any ‘support issues’ (if any) and (if available) potential solutions.

[\*]

**Section 9. Quality Assurance**

This section contains both a narrative and numerical analysis to describe the status of the quality of the Work being performed and compliance to documented procedures.

1. List all Quality issues and concerns: [\*]
2. List all Supplier’s audits: ‘planned’ and ‘actual’: [\*]
3. List Supplier’s and lower tier suppliers (i.e. major Sub-subcontractors) audits: ‘planned’ and ‘conducted’: [\*]
4. Status report on audit non-compliances (including corrective and preventative actions) specific to the Subcontract: [\*]
5. Status of any Defects/deficiencies/non-conformances:

[\* insert text

**Section 10. HSE Report**

Typical items to report include:

1. HSE issues and concerns: [\*]
2. Incidents this month (reportable and recordable)’ [\*]

**Section 11. Project Management Organisation**

This is a narrative section to describe the status of the Project Management organisation and whether any of the ‘Key Staff’ identified in the Project Execution Plan have ceased being employed by the Supplier or diverted to other projects or work and, if so, plans to replace them.

[\* insert text]

**Section 12. Resource Plan**

This is a narrative section to describe the status of the Resource Plan (if required by the SOW) and to identify any changes from the Project Execution Plan.

[\* insert text]

**Section 13. Industrial and Regional Benefits (IRB)**

This is a narrative section to describe the status of commitment against the IRB obligations and to identify any changes from the last Progress Report.

[\* insert text]

**Section 14. Risk Management**

This is a narrative section to describe the status of management of risk and to identify any changes from the last Progress Report.

[\* insert text]

**Section 15. Delivery Schedule**

This is a narrative section that describes the actual delivery of the Deliverables against the Delivery Dates (if not already covered elsewhere in this report).

[\* insert text]

**Section 16. Items Raised By Purchaser**

This narrative section is to answer any questions and/or complaints that the Purchaser has raised either in response to the last Status Report (if required by the SOW), Progress Report, Meetings, Project Review, Minutes, inspections or audits of the Work, correspondence, Notices, etc...

[\* insert text]

**Section 17. Items Raised By Supplier**

This narrative section is to record any questions and/or complaints that the Supplier has raised in the last Status Report (if required by the SOW), Progress Report, Meetings, Project Review, Minutes, correspondence, Notices, etc...

[\* insert text]

**Section 18. Closure of Action Items and Issues**

1. List in tabular or graphic form "opening" versus "closure" of Action Items and issues:

[\*];

1. List all open Action Items and issues over thirty (30) calendar days old:

[\*]

(insert Action Item and issues spreadsheet tabular format if more convenient)

**Section 19. Areas of Concern**

‘Areas of Concern’, together with proposals or recommendations of remedial actions.

[\* insert text]

**Section 20. Export Control / Security**

Are the deliverables Controlled Goods? Yes/No

Are the Deliverables controlled by ITAR or EAR? Yes/No

[\* insert text]

**Section 21. Other Matters Not Covered Above**

This is a narrative section to cover any and all material matters that the Supplier believes has not previously been covered above. The Supplier shall add any matter in this section that has, is or will adversely affect progress and quality of the Work in order to present to the Supplier an objective, accurate, candid and truthful report as to the progress of the Work and its performance of its obligations.

[\* insert text]

**Special Instructions**

All documents, if any, referred to in a Progress Report shall be attached to each Progress Report as Attachment A., Attachment B, etc…