**Data Item Description**

**Progress Report**

**PM361**

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| **Progress Report** | **PM361** |

**Purpose**

The Progress Report is intended to make the Purchaser aware of the Supplier’s progress of the Work against the Integrated Project Team’s Master Schedule. 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. The Supplier shall support the sections identified below with its own in-house produced management information and Data.

**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) of Schedule D1 (SOW).

**Format and Content**

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

**Section 1. Introduction**

This section shall provide an introduction identifying the following:

1. Agreement number: [\*]
2. Covering Purchase Order #: [\*]
3. Description of the system and/or Goods: [\*]
4. Summary of change in Price since Contract Award +/-: [\*]
5. Narrative for Section 1, including a summary of progress since the last Progress Report and summary of planned progress until the next Progress Report.

[\* insert text]

**Section 2. HSE Report**

Typical items to report include:

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

|  |  |  |
| --- | --- | --- |
|  | Since Last Progress Report | To Date |
| Near Misses |  |  |
| First Aid(s)  |  |  |
| Reportable Incidence(s) |  |  |
| Days Lost |  |  |

**Section 3. Activities**

This section shall identify the activities to be carried out during the next reporting period, as a minimum the following are to be included:

1. Critical activities scheduled till the next reporting period and details of any issues relating to these critical activities;
2. Goods due to be delivered and details of any issues relating to meeting the expected date of delivery; and

**Section 4. Schedule**

|  |  |  |
| --- | --- | --- |
|  | Subject(s): | [\*] |
| f. | Status of Recovery Plans: | Nos: [\*] | Description: | [\*] | Forecast: | DDMMMYY |
| g. | Milestones achieved to date: | Nos: [\*] | Dates: DDMMYYY | Forecast: DDMMMYYY |
| h. | Milestones missed to date: | Nos: [\*] | Dates: DDMMMYY | Forecast: DDMMMYY |
| i. | Reason for Milestones not achieved: |
| j. | Narrative for Section 4:[\* insert text]This  |

**Section 5. Resources**

a. This is a narrative section to describe any issues related to labour and any changes in personnel, particularly key personnel, which have the potential to directly affect the Work.

[\* insert text]

b. [\*insert labour statistics table], the labour statistics table details the number of employees for this reporting period and forecasted for the next reporting period, the table should indicate what functional area the personnel will work on and what category of labour the personnel is covered under.

**Section 6. Risk & Opportunity Management**

This is a narrative section to describe any risks that need to be addressed or any opportunities for improvement during the next reporting period and the Supplier’s mitigation strategy.

[\* insert text]

**Section 7. Other Issues and/or Actions**

This is a narrative section to describe any Issues and/or Actions that have been resolved since the last reporting period if not covered elsewhere on this report and any Issues and/or Actions that should be resolved during the next reporting period.

[\* insert text]

**Section 8. Commercial**

This section shall identify the following:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| a. | Unresolved Change(s): | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| c. | Directions from Purchaser: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| h. | Warranty claims: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
| f. | Disputes: | Nos: | [\*] | Dates: | DDMMMYY | Description: | [\*] |
|  |  |  |  |  |  |  |  |

**Section 9. Financial**

This section shall identify the following:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| b. | Approved Payment Claims not paid: |  | $ | [\*] | Dates: |  | DDMMMYY |
| c. | Claim forecast for next six (6) Months: |  | $ | [\*] |  |  |  |
| d. | Narrative for Section 3 / Other issues relating to invoices and/or payments |
| [\* insert text] |

**Section 10. 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.