Progress Documentation

From Guidance for Grants (https://historicengland.org.uk/images-books/publications/guidance-grants-projects/)

# Suggested format for Highlight Reports

Highlight Reports should be written by the Project Manager. They should be emailed to your Project Assurance Officer (PAO) at least one week in advance of meetings. They should address general progress, as well as specifically covering any project milestones due during the review period.

Headings generally include the following, although complicated projects may require additional headings and considerable detail.

|  |  |
| --- | --- |
| **Project name and number:** |  |
| **Author:** |  |
| **Date:** |  |
| **Circulated to:** |  |
| **Period covered** (normally since the last project meeting or last highlight report): |  |
| **General progress:** |  |
| **Timetable** (is the overall project on schedule, ahead of schedule or falling behind?): |  |
| **Budget** (is the overall project on budget, underspent or overspent?): |  |
| **Resources** (does the overall project have the resources; staff, time, equipment etc, it needs?): |  |
| **Products and tasks completed during this period**, i.e. since the last highlight report |  |
| **Products and tasks to be completed during the next period**, i.e. before the next highlight report |  |
| **Project risks** – have there been any changes in the status or likelihood of risks documented in the risk log? Have any new risks been noted? |  |

It might be useful, for long and complicated projects, to include a report by task as listed in the project design, giving amount of time used and estimated percentage of task complete. This will demonstrate any risk associated with the timetable or costs. A comments section should also be included which notes how problems will be addressed.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task No. | Days allocated in PD | Days already undertaken | Estimated % complete | Comments |
| Task 4 | 8 | 6 | 85% |  |
| Task 5 | 10 | 7 | 50% |  |

# Suggested format for end of project Stage Closure Reports

Project stage closure reports should be written by the Project Manager. They should be emailed to your Project Assurance Officer (PAO), and to the Grants Team at Historic England at the end of each agreed project stage.

Reports should summarise the project and must include a statement on the impact and public value it has or will have in the future. They should also set out highlights, challenges and recommendations which might help you or Historic England when planning future projects.

Headings generally include the following, although innovative, complicated or problematic projects could require additional headings and considerable detail. Some questions you may wish to consider are set out below, but you should think about your project and address its specific issues.

|  |  |
| --- | --- |
| **Project name and number:** |  |
| **Author:** |  |
| **Date:** |  |
| **Project summary and impact statement:** | A short description of the project, and its outcomes. Some questions to consider should be:* What did it achieve and/or produce and how did it do this?
* How was the project publicised, disseminated and promoted?
* What will change as a result of the project?
* What or who will benefit from the project outcomes and outputs (products) and how will this benefit be realised?
* Will the project make a huge difference to a few historic buildings or places/people/groups, or will it influence a lot of things/people to some degree?
* How do you, or will you, know if your outcomes/impact have been achieved, and do you need to assess the outcomes/impact of your project in the future? If so, when?
* Has sustainability been addressed, how will the project continue to make a difference, and are any systems or agreements in place which ensure this happens?
* It is a Historic England corporate priority to enrich the National Heritage List for England. Can this project contribute to this?
 |
| **Highlights:** | Which processes, tools, techniques and methods worked well and why? |
| **Challenges:** | Which processes, tools, techniques and methods encountered problems and why?Some questions to consider could be:* Did the project achieve its aims, or more/less than intended?
* Were there any exceptional outputs, e.g. photographs, specific reports, new methods?
* Did anything not work as planned?
* Did project management processes work well?
* Was communication good (between project staff and external experts, with stakeholders, with Historic England?)
* Did you get good buy-in from stakeholders or owners?
* Were information sharing methods in place, and did they work?
* Were expectations of colleagues and stakeholders realised?
* Was dissemination and promotion good; what was publicity and press coverage like?
* Was the project team sufficiently skilled, trained and empowered?
* Were sufficient risk strategies in place and managed?
* Did quality-assurance procedures work well?
* Were allocated time and resources sufficient?
* Did the project complete on time?
 |
| Research Ethics (if applicable to the project) | 1. Were there any significant change(s) to the project that had ethical implications?

 If *Yes*, what was the outcome of this  amendment?1. Were there any unanticipated serious adverse effects on participants, the environment and/or cultural heritage?

 If *Yes*, please provide details of the action  taken to address them |
| **Recommendations:** | Were any lessons learned, and can you make recommendations which will improve similar projects in the future? |