



Project Health Dashboards

PROJECT HEALTH DASHBOARD

The Project Health Dashboard is a way for leadership to get a glance look at a project and see if there are risks associated to the budget and schedule health of a project. By using this dashboard leadership can zero in on the projects that have issues and get ahead of those issues before they become major risks to project budget and schedule.

A project will appear on the Health Dashboard after a Project Report or progress report has been created for the project.



DEFINING PURPOSE AND SCOPE

Identify Stakeholders

Identify all parties who have an interest in the project, including the sponsor, steering committee, project team, and other stakeholders.

Understand the needs and expectations of each stakeholder and how they may impact the project.

Define Project Objectives

Establish clear, measurable goals for the project that align with the organization's strategy.

Establish a Project Charter

Document the project's purpose, objectives, and the roles and responsibilities of the project team.

Obtain approval from the sponsor and steering committee.

Communicate the project charter to all stakeholders to ensure everyone is aligned on the project's goals and scope.

Review and update the charter as needed throughout the project lifecycle.

Summary

Defining purpose and scope is a critical first step in project management. It involves identifying stakeholders, setting clear objectives, and creating a project charter to guide the project's execution.

By following these steps, you can ensure that your project is well-defined and has a clear path forward.

PROCESS

3) Find Projects Dashboard in a maximized view.

Red – Not Proceeding as Expected
CPI and SPI = .5 and below

Yellow - At Risk
CPI and SPI = .75 to .5

Green – Proceeding as Expected
CPI and SPI = 1 to .75

Black spaces indicate projects that do not have enough information to conclude their health status.

IMPORTANT

Information used to calculate this dashboard comes from the Project Reports complete on that project.

PROCESS

Glossary of Terms

Field	Description
Actual Percent Complete As of Period End Date	Manual entry by PM, with estimated completion percentage
Budgeted Cost of Work Performed	<u>Baseline Budget</u> * % Complete
Actual Cost Period End	Invoices Paid as of Report End Date
Cost Performance Index (CPI)	Budgeted Cost of Work Performed / Actual Cost Period End
Schedule Performance Index (SPI(t))	Earned Schedule Duration / Planned Days
Estimated Final Duration	Utilizes: Planned Duration, Budgeted Cost of Work Performed, <u>Baseline Budget</u> , <u>Spend Plan Curve</u> , <u>Baseline Budget</u>
Estimated Final Cost	(Forecast Final – Paid Invoices)/CPI + Paid Invoices ELSE Forecast Final/CPI
Forecast Final	Current Commitment + Potential Change Orders + <u>Forecast to Complete</u>
Estimated Final End Date	<u>Project Plan Start</u> + Estimated Final Duration
Estimated Final Duration	Planned Duration / SPI
Planned Duration	Duration of <u>Project Plan Start</u> to <u>Project Anticipated Financial End</u>

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