

(L7)

PROGRESS REPORT

From Contractor name and address: <hr/> <hr/> <hr/>	To Owner: <hr/> <hr/> <hr/>
Description of property improved: <hr/> <hr/> <hr/>	Overall project percentage complete as of this date: <div style="text-align: right;">_____ %</div>

Progress payment(s): _____

Weather and site conditions: _____

Change orders: _____

Factors affecting schedule: _____

Scheduling		
Current phase (describe):	Estimated finish date	
Next phase (describe):	Estimated finish date	
Materials on Order		
Description	Date ordered	Date received/ to be received

Comments: _____

Dated: _____

(Signature and title)

Instructions for Progress Report

Although not required, this is a recommended form to be used in giving an owner (especially as to residential projects) a quick status report on the project. It is specially formulated to be simple as far as the detail required. By definition, it is used when the parties are still open in their communication channels. For this reason, its purpose is not to “posture” or openly preserve your legal rights in cases of major disputes.

So, why give it? There are a number of reasons:

- It is a great PR tool because owners are always “ansie” in finding out how much longer the project will take. It will also keep to a minimum needless phone calls on the same subject. Owners are much more relaxed and content when they know what is coming up next. On the other hand, care was made there was no statement as to a specific completion date for the overall project. This is important, because even though you state that date as an estimate, homeowners conveniently forget this fact and customarily “hold you to it”, making claims for delay even though it not your fault.
- It gives you a good opportunity to talk about payments, especially if they are behind in a progress draw. It operates like a follow-up reminder for payment.
- Under “Weather and site conditions”, you have a good opportunity to document the file as to unforeseen delays. For example, you might make the following notation: “Rain heavy from March 4 to March 9. Dry-out required before heavy equipment can again be used at the site. Estimate work will re-commence on March 12”.
- Don’t miss your chance to document that you have been told to do extra work, including the exact description and how much.
- Under “Factors affecting schedule”, you can say for the record why there were may be a delay, such as: “Back order of light fixtures to delay electrical finish work. To be installed within 2 days after receipt”.
- Under “Comments”, use this to your advantage to confirm conversations you have had so there will be no sudden lapse of memory if there is ever a dispute.