Instructions for the Milestone Schedule/Progress Report

This spreadsheet form was created in Microsoft Excel 97 for the PC, and preparers should have a working knowledge of spreadsheets. Many of the cells are “unprotected;” in other words, you can change them. Please try not to change the format, except to add or delete rows when setting up activity milestones. Click the Undo arrow in the Toolbar if you feel you made a mistake.

1. First, enter the name of the grantee organization, the contact person, the phone number, preparation date, original plan date, and amended plan date in the spaces provided at the top of the form. This form has been designed so that this information will repeat at the top of every page when you print it.

2. The next row is the header row of the table. It will also appear at the top of every page. In this row, replace the XXXs and YYYYs with months and years. Because of limited space, you will only be able to use the first three letters of the month.

3. The bold lines in the table separate the projects, and the light lines separate the activities within a project. Go to the first cell on the left marked Project Name in bold, and replace it with the name of a project.

4. In the next cell to the right in the same row, replace Activity milestone with the name of an activity that is part of the project.

5. Each monthly column is subdivided into projected and actual columns, which are unshaded and shaded, respectively. In four words or fewer, insert projected milestones and dates. For example, put “Start by 7/15” (July 15) in the July projected column and put “Complete by 9/15” (September 15) in the September projected column. Put the actual start and complete dates in the shaded columns; such as, “Started 8/1” in the August actual column and “Completed 10/1” in the October completed column. Of course, if you prepared and submitted this form in September, the October actual column would be empty.

6. If a project has fewer than three or four activities, you may need to remove a row in this form. Simply move the cursor over the row number on the left and click once. The entire row will be selected. Pull down the Edit menu and select Delete.

7. If a project has more than three or four activities, you will need to insert a row. Let’s say there are three activities listed in a project, and you need to add a fourth one between the second and third. Choose the first cell in the third row. Pull down the Insert menu and select Rows. The new third row will appear, and it will have the same characteristics as the second, minus the text. Enter the new activity name in column B and continue entering information across the row as explained in Step 5.