

# SBHP Annual Performance Evaluation Project Management Milestone Tool

By: Steve Lantz, SBCCOG Transportation Director

- At the beginning of the project, insert the Project Information on the top left corner: FY (Metro Fiscal Year e.g. 17-18) and Month to be updated monthly

Reporting Period:						Color Key		
FY	-						Milestones/Completion Dates	
Month	-						Budget/Expenditures	
MR Number:	-						Not used: Do not input data	
Project Name:	-						Cells are auto-calculated through formula	
Lead Agency:	-							
						<b>Quarter 1 FY17-18</b>		
						<b>July</b>	<b>August</b>	<b>September</b>
Task #	Sub-task #	Milestones (Select Applicable Milestones)	Start Date for selected milestones	End Date for selected milestones	Phase Budget (\$)	Task Completion (Date)	Task Completion (Date)	Task Completion (Date)
1		<b>Planning</b>			\$ -			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Concept Report						
	002	Prepare Feasibility Study						
	003	Prepare Project Study Report						
	004	Intelligent Transportation Systems (ITS) - Feasibility Study						
	005	Intelligent Transportation Systems (ITS) - Concept Exploration						
		<b>Phase Expenditures</b>						
2		<b>Preliminary Design</b>			\$ -			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Detailed Design Plans						
	002	Prepare Detailed Construction Plans						

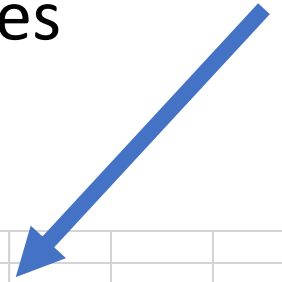
- At the beginning of the project, insert START date and END date for the milestones applicable to your project, based on the Funding Agreement made with Metro

Reporting Period:						Color Key		
FY		-				Milestones/Completion Dates		
Month		-				Budget/Expenditures		
MR Number:		-				Not used: Do not input data		
Project Name:		-				Cells are auto-calculated through formula		
Lead Agency:		-						
						Quarter 1 FY17-18		
						July	August	September
Task #	Sub-task #	Milestones (Select Applicable Milestones)	Start Date for selected milestones	End Date for selected milestones	Phase Budget (\$)	Task Completion (Date)	Task Completion (Date)	Task Completion (Date)
1		<b>Planning</b>			\$ -			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Concept Report						
	002	Prepare Feasibility Study						
	003	Prepare Project Study Report						
	004	Intelligent Transportation Systems (ITS) - Feasibility Study						
	005	Intelligent Transportation Systems (ITS) - Concept Exploration						
		<b>Phase Expenditures</b>						
2		<b>Preliminary Design</b>			\$ -			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Detailed Design Plans						
	002	Prepare Detailed Construction Plans						

- At the beginning of the project, insert the Phase Budget based on the Funding Agreement made with Metro

						Quarter 1 FY17-18		
						July	August	September
Task #	Sub-task #	Milestones (Select Applicable Milestones)	Start Date for selected milestones	End Date for selected milestones	Phase Budget (\$)	Task Completion (Date)	Task Completion (Date)	Task Completion (Date)
1		<b>Planning</b>			\$			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Concept Report						
	002	Prepare Feasibility Study						
	003	Prepare Project Study Report						
	004	Intelligent Transportation Systems (ITS) - Feasibility Study						
	005	Intelligent Transportation Systems (ITS) - Concept Exploration						
		<b>Phase Expenditures</b>						
2		<b>Preliminary Design</b>			\$			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Detailed Design Plans						
	002	Prepare Detailed Construction Plans						
	003	Prepare Project Cost Estimate						
	004	Intelligent Transportation Systems (ITS) - Concept of Operations						
	005	Intelligent Transportation Systems (ITS) - Systems Requirements						
	004	Intelligent Transportation Systems (ITS) - High Level Design						
		<b>Phase Expenditures</b>						
3		<b>PA&amp;ED</b>			\$			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Environmental Document						
	002	Scoping						
	003	Technical Studies						
	004	Draft Environmental Document						
	005	Final Environmental Document						
	006	Community Outreach						
	007	Secure Project Approval						
	008	Intelligent Transportation Systems (ITS) - Categorical Exemption Filing						
		<b>Phase Expenditures</b>						

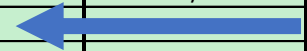
- At the beginning of the project, insert the PROJECTED expenditures for each phase in each quarter



					Quarter 1 FY17-18				
					July	August	September	PROJECTED Expenditures	ACTUAL Expenditures
Task #	Sub-task #	Milestones (Select Applicable Milestones)	Start Date for selected milestones	End Date for selected milestones	Phase Budget (\$)	Task Completion (Date)	Task Completion (Date)	Task Completion (Date)	
1		<b>Planning</b>			\$ -				
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A	
	001	Prepare Concept Report							
	002	Prepare Feasibility Study							
	003	Prepare Project Study Report							
	004	Intelligent Transportation Systems (ITS) - Feasibility Study							
	005	Intelligent Transportation Systems (ITS) - Concept Exploration							
		<b>Phase Expenditures</b>						\$ -	\$ -
2		<b>Preliminary Design</b>			\$ -				
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A	
	001	Prepare Detailed Design Plans							
	002	Prepare Detailed Construction Plans							
	003	Prepare Project Cost Estimate							
	004	Intelligent Transportation Systems (ITS) - Concept of Operations							
	005	Intelligent Transportation Systems (ITS) - Systems Requirements							
	004	Intelligent Transportation Systems (ITS) - High Level Design							
		<b>Phase Expenditures</b>						\$ -	\$ -

- For each month, insert the ACTUAL date each milestone was completed (if any)

						Quarter 1 FY17-18		
						July	August	September
Task #	Sub-task #	Milestones (Select Applicable Milestones)	Start Date for selected milestones	End Date for selected milestones	Phase Budget (\$)	Task Completion (Date)	Task Completion (Date)	Task Completion (Date)
1		<b>Planning</b>			\$ -			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Concept Report						
	002	Prepare Feasibility Study						
	003	Prepare Project Study Report						
	004	Intelligent Transportation Systems (ITS) - Feasibility Study						
	005	Intelligent Transportation Systems (ITS) - Concept Exploration						
		<b>Phase Expenditures</b>						
2		<b>Preliminary Design</b>			\$ -			
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A
	001	Prepare Detailed Design Plans						
	002	Prepare Detailed Construction Plans						
	003	Prepare Project Cost Estimate						
	004	Intelligent Transportation Systems (ITS) - Concept of Operations						
	005	Intelligent Transportation Systems (ITS) - Systems Requirements						
	004	Intelligent Transportation Systems (ITS) - High Level Design						
		<b>Phase Expenditures</b>						



- For each quarter, insert the ACTUAL expenditures for each phase for that quarter



					Quarter 1 FY17-18					
Task #	Sub-task #	Milestones (Select Applicable Milestones)	Start Date for selected milestones	End Date for selected milestones	Phase Budget (\$)	July  Task Completion (Date)	August  Task Completion (Date)	September  Task Completion (Date)	PROJECTED Expenditures	ACTUAL Expenditures
1		<b>Planning</b>			\$ -					
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A		
	001	Prepare Concept Report								
	002	Prepare Feasibility Study								
	003	Prepare Project Study Report								
	004	Intelligent Transportation Systems (ITS) - Feasibility Study								
	005	Intelligent Transportation Systems (ITS) - Concept Exploration								
		<b>Phase Expenditures</b>							\$ -	\$ -
2		<b>Preliminary Design</b>			\$ -					
	000	City Staff Project Management	N/A	N/A		N/A	N/A	N/A		
	001	Prepare Detailed Design Plans								
	002	Prepare Detailed Construction Plans								
	003	Prepare Project Cost Estimate								
	004	Intelligent Transportation Systems (ITS) - Concept of Operations								
	005	Intelligent Transportation Systems (ITS) - Systems Requirements								
	004	Intelligent Transportation Systems (ITS) - High Level Design								
		<b>Phase Expenditures</b>							\$ -	\$ -

## Final Steps:

- Save the spreadsheet with an updated month in the title block
- Send to SBCCOG along with your monthly Metro report



