

CERP Guidance Memorandum

South Florida Water Management District – Jacksonville District, U.S. Army Corps Of Engineers

CGM NUMBER-REVISION: 001.00

EFFECTIVE DATE: 11/07/01

CATEGORY: Reports

SUBJECT: Project Status Indicators

DESCRIPTION:

This memorandum provides guidance to Project Managers (PM) on the use of Project Status Indicators (Red/Yellow/Green Indicators, or “Stoplight“ Indicators) for reporting the status of projects pursued under the Design Agreement executed between the South Florida Water Management District (SFWMD) and the Department of the Army for the Comprehensive Everglades Restoration Plan (CERP). The use of indicators has been discussed and agreed upon by the Design Coordination Team (DCT). This document is intended to provide specific guidance on the use of project status indicators with the CERP program in reporting to the DCT.

GUIDANCE:

This guidance memorandum is based on an issue paper titled “Guidance for Project Status Indicators”, which was approved at the 11/7/01 DCT meeting. This guidance establishes a standard metric to the graphical “Red – Yellow – Green” project status indicator that the DCT has chosen to include in their monthly progress report. The project status metric, composed of either a red, yellow or green indicator, displays at a glance whether a project is on time and within budget, and whether a project is proceeding according to plan (schedule). Project managers will assess their projects for both criteria on a monthly basis. The project’s status indicator will reflect the greater deviation of the two criteria. For example, if a project is 10 percent over budget (indicating yellow status), but less than 30 days late (indicating green status), it will be considered in yellow status because that is the greater deviation of the two criteria. For each project, based on the current approved budget and schedule, the respective PM’s will indicate for Budgeted/Estimated Costs and Schedule Progress, whether the Project Status is "Red", "Yellow" or "Green" based upon the following range variables and guidelines:

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Significant Budget/Schedule Issues=

Red

[>10% over budget OR >60 days late]

Budget / Schedule Issues Emerging =

Yellow

[5 - 10% over budget OR 30 - 60 days late]

According to Plan / On Schedule =

Green

[< 5% over budget OR < 30 days late]

Guidelines for Indicating Budgeted/Estimated Costs Status:

1. All projects start on green. The indicator will be used to reflect the project budget/cost for the current project phase.
2. Should a project's original estimated/budgeted cost (including contingency) increase at least five (5) percent but not exceed ten (10) percent, the indicator will change to yellow.
3. Should a project's original estimated/budgeted cost (including contingency) increase in excess of ten (10) percent, the indicator will change to red.
4. The indicator will remain in this status until such time as a project change request has been approved to bring the estimated/budgeted cost within the stated parameters.
5. All indicators will be accompanied by two notes:

Cause of Current Status - Which explains in two sentences or less the action resulting in the current status; and

Corrective Action - Which explains in two sentences or less the action to be taken to correct the Cause of the change in status.

6. Additional information should be available to further explain both of the notes.

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Guidelines for indicating Schedule Progress:

1. All projects start on green. The indicator will be used to reflect the project schedule for the current project phase.
2. Should a project's original schedule or latest update indicate a negative float increase at least thirty (30) days, but not more than sixty (60) days, the indicator will change to yellow.
3. Should a project's original schedule or latest update increase in excess of sixty (60) days, the indicator will change to red. Any projects that are past their mandated in-service date will be shown as red.
4. The indicator will remain in this status until such time as a project change request has been approved to bring the schedule within the stated parameters.
5. All indicators shall be accompanied by two notes:

Cause of Current Status - Which explains in two sentences or less the action resulting in the current status; and

Corrective Action - Which explains in two sentences or less the action to be taken to correct the Cause of the change in status.
6. Additional information should be available to further explain both of the notes.

APPLICATION:

Project managers will use project status indicators in conjunction with monthly project status sheets to report the status of their projects. Project managers are expected to assess their projects on a monthly basis and update the project indicator accordingly. Explanations of project status and the associated corrective actions for projects in status other than green will be captured on the monthly project status sheets.

Project status indicators reported on the monthly progress reports will also be used to indicate status of each project on <http://www.evergladeplan.org>.

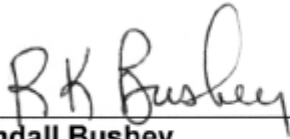
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DATE: 11 April 02



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DATE: 4/11/02

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