

REQUEST FOR BOARD ACTION

HENDERSON COUNTY BOARD OF COMMISSIONERS

MEETING DATE: Monday, January 3, 2005

SUBJECT: Project Tracking System

ATTACHMENTS: Yes

SUMMARY OF REQUEST:

The County Manager's staff has developed a system for project tracking the County's numerous projects in the current and upcoming fiscal years. The County Manager will discuss his recommendations in this regard at this evening's meeting.



Avalina Merrill
Administrative Assistant
avalina@hendersoncountync.org

MEMORANDUM

To: David E. Nicholson
From: Selena Coffey
Date: December 20, 2004
Subject: Project Tracking

I am writing in follow-up to our conversation regarding project tracking. The County has initiated a number of projects for the current and upcoming fiscal years. In our conversations, you have indicated a desire to present a formal report (similar to the one used by Polk County) to the Board of Commissioners once each month in order to update them on the status of various projects, as well as the steps forward in project completion. I have developed the following form to use in tracking these projects. As you will see, the form is similar to one used in 2002-2003 for tracking specific issues, such as the completion of the Comprehensive County Plan (CCP). The form includes spaces for the project description, current status, steps forward, and unlike the previous version, it includes a space for any significant changes in the project, including scope of work, timelines, etc. I feel that this form will help to keep us on track with completing County projects, as well as keep the Board of Commissioners abreast of our progress.

My recommendation would be that you assign project updates to your management team and have them complete the form(s), return them to you for your review and/or questions, and then forward to me for inclusion in a "master" monthly report, which will also include any other pertinent items (such as correspondence, etc.) regarding these projects or any other issues that you feel should be reported to the Board. This will be a fairly simple process, especially since your staff has completed this type of form in the past. I recommend that we begin implementing this monthly reporting process with the Board's January 19th meeting.

In addition to providing this formal monthly report to the Board of Commissioners, I am also working on establishing a project tracking system using the Microsoft Project software application or something similar. The type of system that I am researching would provide a visual cue that "pops-up" on our computer screens and would work collaboratively with our Microsoft Outlook or Lotus Organizer calendar systems to remind us of upcoming project-related tasks. Further, I have begun creating a rather large Microsoft Visio project timeline, which shows the major capital improvements projects and can be adapted to include any other projects that you would like represented. This timeline can be mounted onto a foam board and can be posted in your office and can be used to update the Board on project status as we move forward.

In conclusion, as you're aware, I am continuing my coursework through UNC-Charlotte in Project Management and have an upcoming class in January 2005. I have looking forward to continuing this course, as I expect that it will provide me with examples of project management systems in use in other governments, as well as in private business.



Project Update

Project Description:	
Date of Project Update: (month/year)	
Project Update Prepared By:	
Current Status of Project (Includes most recent activity)	
Steps Forward: (Description of upcoming project activities)	
Significant Project Changes: (Description of any changes in timelines or scope.)	