Surtax PMO Project Status Report Template*

Overall Status

<Municipality> Project: *<fill in project name and/or id>*	**Municipal Project Manager:** *<fill in>*	**<date>**

Progress update:

▪ ?

Key upcoming activities:

▪ ?

Issues/Challenges:

▪ ?

Overall Progress Summary: *(may include)*

• *Key take-aways for BoCC, County Administration, Surtax Admin, Public/Oversight Board*
• *Key reminders of critical decisions/milestones/etc.*
• *Gantt chart indication of current status within the plan (insert .png, etc.)*

Project Metrics:

• **Financial burn rate; actual vs. planned**
• **% Milestones met (on time or early)**
• **# Days over budget**

Proposed solutions:

* Format is subject to change

🔴 Red = Execution critical delay
🟡 Amber = Delay; but recoverable
🟢 Green = On track

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Standard Project Milestones

PMO requires monthly project status reports; including milestone tracking

Project Type	Milestones Required	Notes
PLANNING	Project START	Consultant Planner/EOR to provide interim milestones; as applicable
	Project END	
DESIGN	Project START	Exception: Design projects less than $250K and/or project duration:
	Preliminary (for projects longer than 3 months) (aka 30%/Phase I)	• 6 weeks or less; 0 intermediate milestones • 6 weeks to 3 months; 1 intermediate milestone decided by Municipality
	Design Development (for projects longer than 3 months) (aka 60%/Phase II)	
	Complete – subject to change (for projects longer than 3 months) (aka 90%/Phase III)	The Engineer of Record (EOR) provides and certifies the Critical Milestone activities; which serve as the basis for the POR
	Project END (i) Complete – not subject to change (ii) Plans signed & sealed	
CONSTRUCTION	TBD; proposed by the CEI provider and agreed to by the Municipality (Including START & END) NOTE: for capital projects, the plan of record is expected to be developed after the first CPM (received from the contractor)	Based on the CPM, the CEI provider/EOR identifies and certifies the Critical Milestone activities; which serve as the basis for the POR submitted and certified by the Municipality

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Project Execution "Cheat Sheet"

	PFA PHASE	CONCEPT	POST - PFA EXECUTION	PRE-SOLICITATION	POST AWARD / NTP	PROJECT EXECUTION	PROJECT COMPLETE	CONTRACT CLOSEOUT
Expected Activities	Broward County, PM Liaison	None	Meet with Municipality to: review key execution compliance Terms and Conditions	*On request*, provide guidance for proactive issue management	Review Plan of Record (POR); Submitted by Municipality	*On-going*; review meetings with Municipality and site visits to support monthly PMO meetings	Confirm project scope of work completion per PFA.	Sync-up with MAP re: execution performance assessment
	Municipality Project Manager			Draft solicitation requirements and submit draft to Surtax Legal Counsel for review	Certify and submit the Plan of Record (POR) within first 30 Days; post NTP\n\nNotify PM Liaison of project START	Certify and submit the Monthly Status Report (include required deliverables where applicable)	Notify PM Liaison of project END	

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