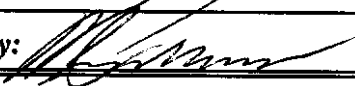# POLICY AND PROCEDURE

Subject: Project Tracking System (QUEST)	Index: Administration Management
	Number: 102-4
Effective Date: June 7, 1995	Prepared By: Finance & Administrative Services
Supersedes: N/A	Approved By:

1.0 **_PURPOSE:_** To establish guidelines for a project tracking computer application used to monitor and manage departmental work plans and other City projects.

2.0 **_ORGANIZATIONS AFFECTED:_** All City Departments

3.0 **_REFERENCES:_** None

4.0 **_POLICY:_**

All City departments will utilize the computer application, QUEST, as a management tool for departmental work plans authorized by the City Council through the annual budget process. Upon direction of the City Manager, additional projects will be tracked through the computer application.

4.1 Responsibility for projects will be at the executive management level. Where appropriate, division heads will be designated as the responsible manager.

4.2 Managers are responsible for ensuring that projects for the fiscal year are entered by July 15.

4.3 Projects entered into QUEST will be completed in accordance with the time frames established in the budget and through Council/Manager directive.

4.3.1 All changes to project start and finish timelines must be submitted in writing to the City Manager for approval. Requests to extend completion dates will be submitted to the City Manager prior to a project's scheduled completion date.

4.4 Managers are responsible for ensuring staff updates QUEST entries on a consistent and regular basis, no less than once every 2 weeks, unless work on the project has not commenced.

4.5 Managers are responsible for assigning appropriate staff representatives to the QUEST Team for the purpose of coordinating system use within the respective division and/or department.

   4.5.1 Staff representatives are responsible for disseminating training information to other division/department employees.

   4.5.2 Central Services will provide training. It is the managers' responsibility to ensure that staff attends the training.

4.6 The project tracking computer application will be administered, coordinated, and managed by Central Services (CS).

   4.6.1 The input of data into the system will be uniform and the CS Division will provide detailed instruction regarding its utilization.

   4.6.2 Meetings will be held as necessary to train staff and improve program operations. This will include a yearly "kick off meeting" held within the first two weeks in July to ensure that new fiscal projects have been completely and correctly entered.

4.7 Departments and divisions may utilize the system for individual use as deemed appropriate by the respective department head.

5.0 **DEFINITIONS:**

5.1 QUEST. The computer application utilized for project tracking purposes.

5.2 QUEST TEAM. Representative staff members from all departments/divisions that are utilized to provide input to CS, as well as guidance and training to fellow staff members.

5.3 PROJECT. One that is designated as a Performance Measure in the annual municipal budget, and others so designated by the City Council, City Manager, or Department Director.

5.4 ON TRACK. A project that is progressing in a successive manner by meeting established milestone and task completion dates, and remains on a schedule toward meeting the established completion date.

5.5 BEHIND. A project that has fallen behind schedule, with milestone and task completion dates that have not been met and is not expected to meet the established completion date.

5.6 DONE/COMPLETED. A project that meets the established Performance Measure and Quantitative Results criteria in the municipal budget, and the Measurable Results listed in the computer application, QUEST.

5.7 AHEAD. A project that is exceeding projected milestone and task completion dates, and is expected to be completed prior to the established completion date.

5.8 HOLD. A project with a circumstance that prohibits further progression toward project completion.

5.9 CANCELLED. A project that is no longer planned for completion.

5.10 TIMELINE. The length of time authorized for project completion.

5.11 MILESTONE. A major necessary step or activity required to complete a project.

5.12 TASK. A necessary step or activity required to attain a completion of a milestone.

6.0 *PROCEDURE:*

Directions for using the computer program are available from Central Services (copy attached). This section is not to be used as an instruction guide for using QUEST.

6.1 Data from QUEST will be incorporated into the City's Quarterly Report. Data transfer will be completed no later than 2 working days following the end of the quarter.

6.1.1 The Project Tracking Section of the Quarterly Report will include summary information on the number of projects that are On Track, Ahead, Behind, On Hold, Done, and Cancelled. Any projects for which an amended timeline was approved during the respective quarter will be included.

6.1.2 Reports will be segregated by division and include the descriptive title of each project, reference number, status, start and completion dates, and an explanation for any project behind schedule.

6.2 Central Services will forward reports to the City Manager on a semimonthly basis by noon on Monday following a City Council meeting.

6.2.1 Reports will include a summary listing of QUEST projects by division, and respective detailed project summary reports sorted according to project status.

6.2.1.1   A detailed project summary report includes project title, description, reference number, timeline, status, original and updated start and completion dates, milestones, tasks, note, and the date that the project entry was last updated.

6.3   The City Manager may use QUEST to measure a manager's performance.

QUEST INSTRUCTIONS

1. Staff accesses the computer application through the City's mini computer system by entering QUEST at the Logon prompt.

   1.1 Projects are assigned a *Project ID* number by the system upon data entry.

   1.2 Project *Titles* are established through the Performance Measures identified in the annual budget.

   1.3 Also incorporated from the Performance Measures, the *Project Description* provides additional detail absent from the Project *Title*.

   1.4 The *Measurable Results* data field includes the Quantitative Results associated with each respective Performance Measure identified in the budget document.

   1.5 Beginning and ending dates for projects which are established in the budget are considered the *Planned* dates.

      1.5.1 Timelines may be *Updated* upon written request of a department head to the City Manager. Such requests will be made on a master form available through the City's word processing system. The City Manager's approval will be forwarded to CS who will be responsible for amending that field of entry.

   1.6 The *Status* of a project will be entered by the project staff and will be reflective of whether the project is meeting approved timelines. Status types include *Ahead, Behind, Cancelled, Done, Hold, Not Started, and On Track.*

   1.7 *Milestones* will be entered for all projects which are reflective of the major steps necessary for project completion. *Target* completion *dates* will be established for each *Milestone* which precede the project completion date. Once done, the *Actual Date* of milestone completion will be entered.

      1.7.1 A *Milestone* may be assigned to any staff, regardless of rank. The status of a milestone will be entered by the assigned project staff.

   1.8 *Tasks* will be entered for all *milestones* which are reflective of the work products necessary to bring a *milestone* to completion. A *task* will be assigned a completion date which precedes the milestone completion date.

      1.8.1 A *Task* will be assigned a target completion date. Once completed, the date entry will be the completion date.

1.9   The *Budget* funding for the project will be entered into the system by the respective department based upon expenditure approval in the City's budget. Funding amounts entered into QUEST are expenditure based, and not reflective of staff time/cost.

    1.9.1   The *Amount Spent* will be entered by the Controller on a monthly basis.

1.10   The *Category* assigned to a project is reflective of the staff resource required to achieve project completion, and, therefore may require more than one entry in this field. Categories are broad and reflective of a department's general scope of work. All departmental work plans identified as Performance Measures in the City's annual budget will be allocated a category which is inclusive of the *City Manager* designation.

1.11   The *Note* field of entry will be utilized to communicate vital information about the current status of a project. If a project is behind schedule, the note field will include the reason for same.

italic   Used to denote terms utilized within QUEST computer application.

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