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Shavington-cum-Gresty Parish Council
Main Rd, Shavington, Crewe, CW2 5DP

PROJECT ASSESSEMENT AND PROGRESSION POLICY

Approved Parish Council 07.12.2022

Summary

The purpose of this policy is to ensure that all potential projects are assessed and progressed equitably. This will ensure the best use of Officer and Councillor time, as well as budgets and Committee time.

The policy seeks to support agile responses to project ideas from across the Council so that the Council can stay flexible and responsive to needs and opportunities, whilst allowing equitable opportunity, control, quality assurance and scrutiny.

Process

The full process is outlined in the flow chart in Annex 1

Ideas for projects can be initiated by either Councillors or Officers and should be detailed on the Project Initiation Document (PID) found in Annex 2.

A new project will need to have its PID approved by the relevant Committee or F&S Committee to be assessed by officers. The exception to this is for 'Quick Wins' and the criteria for this is detailed further on in this policy.

Following approval by the relevant Committee or F&S Committee, Officers will be tasked with carrying out the initial assessment to complete the Project Plan (PP). The assessment will be programmed into Officers' workloads depending on capacity.

Officers will complete the PP attached in Annex 3.

The PP will be brought to the most relevant Committee, or to the Finance & Strategy Committee, along with the draft entry onto the development plan. This will include likely timescales for delivery.

The PP will need to be approved by the relevant Committee, and by F&S Committee, before being presented to Full Council for the final approval. Each new project approved at this stage will be included in the Parish Council Action Plan.

When a project has been completed a Project Completion Report (PCR) will be brought to the relevant Committee. This will include lessons learnt and recommendations for the future (Annex 4) to allow the Council to learn and develop its project management capabilities and develop best practise.

Quick wins

The policy allows for 'Quick Wins' to be identified and progressed in a timely but controlled manner.

A quick win is one that meets all the following criteria:

- Will cost less than £1,000



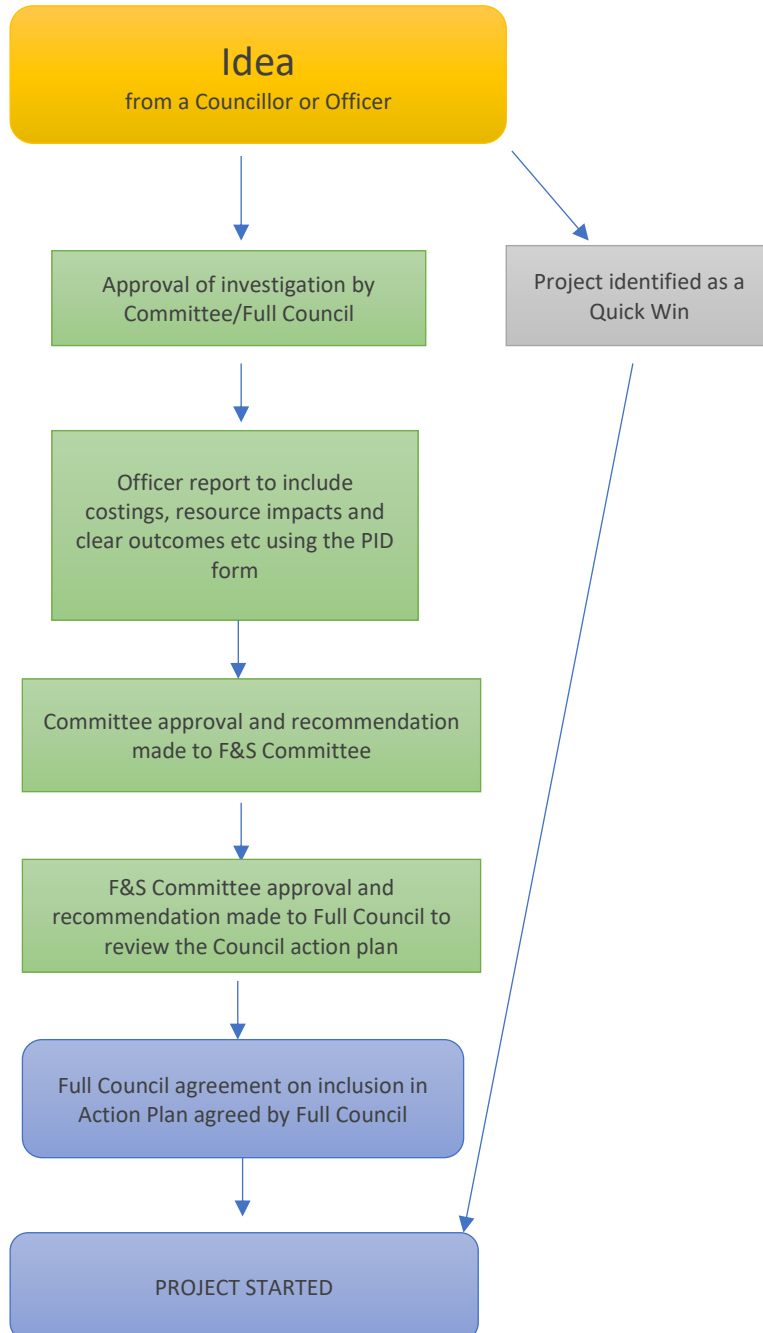
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- All expenditure can be met from existing budget/s
- Will take less than 5 hours of officer time in total (including assessment, planning, working with partners, tendering/quotes etc)
- A call-in has been taken to the relevant Committee and all Members of the relevant Committee support the project
- Does not pose any significant reputational or other risk to the Council or partners



ANNEX 1 – FLOW CHART





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ANNEX 2- PROJECT INITIATION DOCUMENT (PID)

Project Initiation Document		
Name and Position in the Council		Date
Project Name Which Committee does this project come under? (if none, then please add Finance and Strategy Committee)		
Description of project		
Project Aims What do you want the project to achieve? How does it support the Council's plans and aims?		
Target Communities What communities are targeted and what benefits will the project bring to them?		
Research already completed. Please attach all research carried out so far.		
Evidence of need How do you know the project is needed?		
Cost of Project Please detail all cost areas associated with this project. Please include actual costs if known. Please include revenue & capital and include estimate of Officer Hrs if you are able to.		
Benefits Please details all benefits including cost savings, efficiency savings		



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<p>Who? Officer /Councillor Do you have any suggestions for who might be part of the project team? And what role do you think they should take on?</p>	
<p>Other Organisational Support Who do you think we need to work with or take advice from?</p>	
<p>Timeline What is the length of the project work and when will the benefits be realised? Are there any time constraints?</p>	
<p>Risks Are there any risk associated with this project e.g. reputational risks for the Council or possible local sensitivities?</p>	
<p>Is the project a quick win? I.E. does it meet all the following criteria?</p> <ul style="list-style-type: none">a. Will cost less than £1,000b. All expenditure can be met from an existing budgetc. Will take less than 5 hours of officer time in total (including assessment, planning, working with partners, tendering/quotes etc)d. Has the support of all Members of the relevant Committee (*please note this will be verified via Call-In)e. Does not pose any significant reputational or other risk to the Council or partners	
<p>Other information Is there any other information which you feel would help with the project assessment? Please include links to any best practise or similar projects.</p>	



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ANNEX 3 – PROJECT PLAN TEMPLATE

Project Plan name _____

	Information
Document Owner (Officer)	[Name]
Document Owner (Councillor)	[Name]
Issue Date	[Date]
Version	[Date]
Last Saved Date	[Date]

What is a Project Plan?

The Project Plan is the central document by which the project is formally managed. A Project Plan is a document which lists the activities, tasks and resources required to complete the project and realise the business benefits outlined in the Project Business Case. A typical Project Plan includes:

- A description of the major phases undertaken to complete the project
- A schedule of the activities, tasks, durations, dependencies, resources and timeframes
- A listing of the assumptions and constraints identified during the planning process.

To create a Project Plan, the following steps will be undertaken:

- Reiterate the project scope
- Identify the project milestones, phases, activities and tasks
- Quantify the effort required for each task
- Detail project resource
- Construct a project schedule
- List any planning dependencies, assumptions, constraints and risks
- Document the formal Project Plan for approval.



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1. Project

1.1 Project outline

What is being done?

What are the key outcomes and outputs?

1.2 Project justification

What problems does the project seek to address?

Who are the target communities?

What evidence is there of need?

1.3 Partners

Who are the delivery partners?



2. Planning

2.1 Scope

The activities and tasks defined in the project plan must be undertaken within the scope of the project. For this reason, reiterate the scope of the project here.

2.2 Milestones

A milestone is “a major event in the project” and represents the completion of a set of activities. Examples of milestones include:

- Approval by Full Council
- Planning permission granted
- Funding secured
- Additional staff recruited or contractors appointed
- Project specific events

List and describe the key project milestones within the following table:

Milestone	Description	Delivery Date
Project Plan Approved.	The PP has been approved for inclusion in the Annual Plan by Full Council.	xx/yy/zz

2.3 Phases

A phase is “a set of activities which will be undertaken to deliver a substantial portion of the overall project”. Examples include:

- Project Planning
- Project Execution
- Project Closure.

List and describe the major project phases within the following table.

Phase	Description	Sequence
Project Planning	Defining the project by developing a business case, feasibility study and action plan	Phase 1
Project Funding	Detailed quotes for work, budget draft, sources of funding, funding profile	Phase 2
Project Execution	Gaining planning permission, selecting contractors and building the new facility	Phase 3



2.4 Activities

An activity is "a set of tasks which are required to be undertaken to complete the project." Examples include:

- Develop Quality Plan
- Formulate Supplier Contracts
- Perform Project Closure and log lessons learnt

List and describe the major project activities within the following table.

Phase	Activity	Description	Sequence
Project Planning	Detailed project delivery plan	Produce a document describing all tasks and timescales	After the Project Plan but before the formulation of supplier contracts

2.5 Capacity

This details the length of time needed by people to complete each task.

Phase	Activity	Description	Time to complete
Project Planning	Detailed project delivery plan	Produce a document describing all tasks and timescales	3 days
	Staff plan	Ensure relevant staff are aware of commitments and plan is adjusted for leave etc	0.5 day
	Budget	Produce detailed budget	1 day
Tendering	Documents	To produce the documents needed to launch the tender	3 days
	advertisement	To post the tender on Contract Finder	0.5 days



3. Project Plan

3.1 Schedule

Provide a summarised schedule for each of the phases and activities within the project. This is not a full Gantt Chart, but an indication of likely project delivery time

Phase	Activity	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J
Project Planning	Develop Plan																		
Funding	Apply for lottery grant																		
	Result of grant application																		

3.2 Assumptions

List any planning assumptions made. For example:

It is assumed that:

- The project will not change in scope
- Lottery funding will be granted
- The resources identified will be available upon request
- Approved funding from WTC will be available upon request.

3.3 Constraints

List any planning constraints identified. For example:

- The project must operate within the funding and resource allocations approved
- The project team must deliver the improvements with no requirement for additional hardware or future costs
- Staff must complete the project within normal working hours.

3.4 Risks

List any risks identified. For example:

- The project may pose a reputational risk to the Council
- The project relies upon support from a partner/s or the community



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4. Monitoring

4.1 Monitoring responsibility

Who will carry out the monitoring? This should be the responsible Committee or WG set up for the scope

4.2 Monitoring methodology

How will monitoring be carried out, by whom and at what intervals.

4.3 Project end

How will we know the project has finished and who will complete the project completion report?

5. Impact Assessments

5.1 Resources

What are the likely resource impacts? Include a full assessment of staff time required and whether this equates to a separate part-time or full-time post and over what period.

5.2 Financial

What is the full financial impact of the project:

- To the Council (including annual requirements)
- For external funding

5.3 Equalities

Are there any equalities impacts? Please ensure all aspects of The Equalities Act are considered:

- Age
- Disability
- Gender reassignment
- Race
- Religion or belief
- Sex
- Sexual orientation
- Marriage and civil partnership
- Pregnancy and maternity

5.4 Environmental

Are there any environmental impacts

5.5 Crime and Disorder

Are there any crime and disorder impacts

6. Recommendation

Officer recommendation.

Is the project:

- Deliverable in terms of existing officer time and existing budgets



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- If not, what needs to be put in place to allow the project to be progressed or what timescales need to be put in place?
- What benefits will it bring and what headline risks are there?
- The officer recommendation is that the project could be progressed if (staff time and budget provision plan)

The Officer recommendation is that the project **is/is not** progressed at this time.

7. Appendix

Attach any documentation you believe is relevant to the Project Plan.

For example:

- Detailed Project Schedule (listing all project phases, activities and tasks)
- Other documentation (Business Case, Feasibility Study)
- Other relevant information or correspondence.



ANNEX 4 – PROJECT COMPLETION REPORT

Project Plan name _____

	Information
Document Owner (Officer)	[Name]
Document Owner (Councillor)	[Name]
Issue Date	[Date]
Version	[Date]
Last Saved Date	[Date]

What is a Project Completion Report?

The Project Completion Report (PCR) allows for a project to be formally ended and evaluated in terms of delivery. It also allows learning and sharing of developing best practice.

1. Project

1.1 Project outline

What did the project seek to do?

1.2 Project delivery

What did the project seek to do and what did the project deliver against these aims? Who were the main partners?

2. Project evaluation

2.1 Project issues

Where any significant problems encountered and how could these have been avoided?

2.2 Budget provision

Was the budget fit for purpose and were predictions accurate? Is there any remaining funding and what is the plan for this?

2.3 Building best practise

What lessons can we learn from this project and how can these be shared across the Council. Do any changes in policy or procedure need to be brought in?

2.4 Future work

Has this project highlighted the need for future projects? Have any needs been discovered or created?