Project Initiation Policy

Adopted on *9 December 2019*

Introduction

One of the responsibilities of Whyteleafe Village Council ('the council') is to undertake and complete projects, that fall within the scope of its powers and duties, for the benefit of the community.

Projects can be defined as a non-routine piece of work with a defined objective, start and finish time and they may also involve capital expenditure.

The council has a duty of care to conduct these projects as efficiently as possible but there are many common challenges and pitfalls that will be encountered. This policy is designed to provide a simple set of protocols to follow during the entirety of a project i.e. before, during and after.

It is widely recognised that a significant amount of time and effort should be devoted to the initiation phase of any project - this will help to highlight all of the foreseeable issues before the council makes any further investment of resources.

Aims of this Policy

- To share and promote the fundamental principles of good project management from beginning to end.

- To apply these principles to the council's projects.

Phases of any project

Successful projects are shown to have three distinct phases:

- Initiation

- Planning

- Implementation

Initiation

The initiation phase is a process to follow that addresses the fundamentals of any project and should answer the following points - why, what, how, when, how much and the project's scope (what's in and what's not in)

The purpose of this phase is to weigh up and record the balance of inputs against outputs (often referred to as a "a cost benefit analysis").

Help with the Initiation Phase

The council should use any or all of the following techniques to complete the initiation phase:

- Terms of reference – use the BOSCARD method which covers Background; Objectives; Scope; Constraints; Assumptions; Reporting and Deliverables

- Work Breakdown – a list or chart (process) detailing the order of all the main work steps.

- Resourcing - A Resource Requirement Matrix showing resources (people, materials and premises) and costs

Planning Phase

This phase is concerned with:

- Who does what (allocation of responsibility and "ownership")

- Identify potential problems and challenges

- Identify potential opportunities

- Scheduling work

Help with the Planning Phase

The council should use any or all of the following techniques to complete the planning phase:

- Responsibility – Responsibility Assignment Matrix (RAM) and/or Responsibility, Accountability, Consulted and Informed Chart (RACI)

- Problem identification – brainstorm then analyse the impact and probability

- Problem solving – look at measures to prevent, contingencies (triggers) and monitoring and use these to modify the work and resourcing data drawn up during the initiation phase

- Opportunity identification – brainstorm then analyse the impact and probability to promote and exploit the benefits for other council goals

At the end of the planning phase, the council should have produced a full list of responsibilities, the potential problems and solutions and a GANTT chart to show the sequence of work and critical path.

The planning of projects is challenging but will become easier as more projects are assessed and completed. However, the council should also be wary of skipping stages of planning

because of pressure to 'get going'. By completing all the elements of planning, any areas of worry can be identified in detail and communicated to all participants before the implementation phase.

Implementation Phase

- Managing the project (the 'doing' phase)

- Communication

- Handover

- Review

Help with the Implementation Phase

This phase is concerned with good project management which should involve regular comparisons between the progress of the project against the project plan.

- Compare progression against the details set out during the planning phase

- Look to correct any deviation from the project plans

- Assess why the deviation happened

- Take action to bring the project back on course

- Continue to monitor

- Complete a formal handover (if applicable)

The importance of communication during and after implementation should not be underestimated and a review of the whole project process is likely to produce some useful information on best practice and lessons to be learned.

Policy Review Date: December 2020.