[Insert organisation name/logo]

**PROJECT MANAGEMENT POLICY**

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| **Version number** | **Date of issue**  | **Lead author/ reviewer**   | **Consultative panel**   | **Significant changes on previous version** |
| [Yr/no]  | [Date] | [Name/role] | [Name/role/ organisation]  | [For example, incorporate changes to new legislation] |
|  |  |  |  |  |

***Note\****

*This policy template has been developed to meet the needs of a diverse range of services and includes items for consideration in policy and procedure.*

***Not all content will be relevant to your service.******Organisations are encouraged to edit, add and delete content to ensure relevancy.***

*All notes (like this one) should be considered and deleted before finalising the policy, and the contents list should be updated as changes are made and when content is finalised.*

*\*Please delete note before finalising this policy.*

***Note\****

*To update the contents list when all content has been finalised, right click on the contents list and select ‘update field’, an option box will appear, select ‘update entire table’ and ‘Ok’.*

*To use the contents list to skip to relevant text, use* ***Ctrl and click*** *to select the relevant page number.*

*\*Please delete this note before finalising this policy.*

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SECTION 1: POLICY FRAMEWORK

### Policy statement

**[Organisation name]** is committed to effective project management through clearly defined processes which enable staff to manage projects efficiently and effectively, and to measure project outcomes.

### Purpose and scope

This policy has been developed to provide staff with guidance on the management of organisational projects, from concept development and planning through to project evaluation. The purpose of this policy is to ensure projects are managed at **[organisation name]** following a sound and consistent process.

This policy applies to all permanent, contract and casual employees, Board members, contractors, and students, involved in the initiation, delivery, and/or evaluation of organisational projects.

This policy is supported by, and should be read in conjunction with, the [*P*[*roject management lifecycle*](file:///P%3A/Policies/Program%20Management%20%20Policy/Supporting%20documents/Current)](file:///P%3A/Policies/Program%20Management%20%20Policy/Supporting%20documents/Current)*.*

### Definitions

|  |  |
| --- | --- |
| **Activity** | An element of work performed during a project. An activity has an expected duration, cost, and resource requirements. Activities can be subdivided into tasks.  |
| **Consumer representative/s** | An individual or group who takes up a formal role to advocate and represent the issues and concerns of others with experiences similar to their own within an organisation or health setting.  |
| **Deliverable** | Any measurable, tangible, verifiable outcome, product, or result that must be produced to complete a project or part of a project. |
| **Evaluation** | The systematic assessment of process, outcomes and/or impact against the project’s goal/s and objectives. |
| **Milestone** | A significant event in the project, usually completion of a major deliverable; usually reaching milestones are aligned to payments to supplier/s. |
| **Post implementation review** | Conducted after a project is completed to ensure that the project has met its objective, and the output or outcome met the needs and requirements of intended beneficiaries.  |
| **Project** | A project is a planned set of activities to achieve a particular output or outcome, outlining required resources, clear timeline and a defined beginning and end.  |
| **Project life cycle** | A collection of generally sequential project management phases:* Initiation and start up
* Planning and design
* Implementation
* Monitoring and control
* Closure
* Evaluation
 |
| **Project scope** | Defines project parameters i.e. what is considered in and out of scope. |
| **Project schedule** | The due dates for project milestones included in the project plan |
| **Project governance body** | Group responsible for ensuring the project is implemented in line with the project plan. Format/function (if advisory or steering) is determined by the project size and risk level. |
| **Project management** | The application of knowledge, skills, tools, and techniques to manage project activities to meet the project goal/objective.  |
| **Project manager** | Person responsible for managing the project. This may be a program manager or project officer. |
| **Project plan** | A document that describes how the project will be planned, implemented, resourced, scheduled, monitored and closed.  |
| **Project proposal** | A document requiring approval from management that includes project scope, objectives, timeline and budget, which once approved by **[Insert title of role appropriate for your organisation]** provides the project manager with the authority to start the project.  |
| **Project size** | A project is defined as ‘small’ if it meets two or more of the following criteria: 1. Costs associated with the project are **<$XX,000** **[Insert amount appropriate for your organisation]**
2. The project is assessed to be low to moderate risk.
3. The project has an anticipated duration of less than 12 months.
4. The project utilises internal resources
5. The project is funded with existing budget

A project is defined as ‘large’ if it meets one or more of the following criteria: 1. Costs associated with the project are **>$XX,000** [**Insert amount appropriate for your organisation]**
2. The project is assessed to be moderate to high risk.
3. The project has an anticipated duration of more than 12 months.
4. The project requires external partners, sponsors and/or resources
5. The project requires a funding submission or business case to be prepared in order to obtain external funding.
 |
| **Project sponsor** | Senior management or delegate who is responsible for financial resources, governance and oversight to ensure the project aligns with the organisation’s goals.  |
| **Project team** | People who support the project manager in performing the work of the project to achieve its goals and objectives. |
| **Risk** | An uncertain event or condition that, if it occurs, has a positive or negative effect on a project’s budget, schedule, scope, and/or outcome/output. |
| **Stakeholders** | Individuals and organisations that are actively involved in the project, funders or whose interests may be positively or negatively affected by the outcomes of the project.  |
| **Task** | A unit of work or activity required to be completed as per the project schedule, for timely progress towards project goal. Tasks may be further broken down into assignments or subtasks. |

### Principles

* Projects undertaken align with **[insert organisation name]**’s strategic and operational plans, including performance measures and annual budget.
* Where relevant, clients are consulted and invited to participate in decisions or be a part of the project team
* Project management activities and outcomes are communicated with staff, the board, and project steering/advisory committee, sponsors, partner and other stakeholders.
* **[Insert organisation name]** staff, board and students apply the organisation’s values in all aspects of managing a project

### Outcomes

* Byfollowing this project management policy, **[insert organisation name]** ensures that all projects follow a consistent process and are managed efficiently
* Project management activities and outcomes contribute to the development of knowledge, skills and enhanced service delivery outcomes for staff and other parties such as consumers and stakeholders
* Projects are monitored and evaluated, and the information collected is used to inform and improve future activities.

### Roles and responsibilities

|  |  |
| --- | --- |
| **Board/ Board of Directors** | * Endorse and ensure compliance with the project management policy.
* Be aware of key project milestones.
 |
| **CEO/ Executive**  | * Ensure compliance with the project management policy.
* Identify and lead contractual and partnership relationships related to the projects where relevant.
* Communicate with the Board regarding key projects’ status.
* Manage external funding and partnership agreements in line with the *Functions and delegations matrix*.
* Provide support and advice to the project team as required.
 |
| **Project manager** | * Lead projects in line with the organisation’s strategic and operational plans, and in line with relevant funding and partnership agreements.
* Identify and lead contractual and partnership relationships as delegated through project activities.
* Manage project implementation and evaluation including planning, research and consultation, budgeting, risk and issues management, and reporting.
* Manage project communication across the team and organisation.
 |
| **Project officer** | * Support project development, implementation and evaluation including planning, research and consultation, budgeting, risk and issue management, and reporting.
* Support contractual and partnership relationships as delegated through project activities.
* Contribute to project communication across the team and organisation.
 |
| **Project sponsor** | * Provide project management resources and support throughout the project lifecycle.
 |
| **Staff** | * Comply with the Project management policy and seek guidance in the event of uncertainty as to its application.
 |

### Policy implementation

This policy was developed in consultation with **[insert organisation name]** employees and is approved by the Board.

Specific monitoring and support activities undertaken include:

* Referencing this policy in relevant policies, procedures and other supporting documents, to ensure that it is familiar to staff and actively used
* Reviewing the policy in line with the policy development schedule, and any relevant legislative or policy change
* Discussion of projects and status updates as part of the standard agenda in staff meetings
* **[insert other monitoring activity]**

### Risk management

* Risk considerations are embedded in a project plan and are effectively managed through careful planning, resource availability, research, consultation, monitoring and evaluation.
* Mechanisms are in place to ensure that project management systems are effective and regularly monitored.
* **[Insert organisation name]** ensures that projects have a sound base, are ethical and promote evidence-based practice.
* Staff are provided with support and resources to enable projects are developed, implemented and evaluated effectively.
* The need for improvements in organisational projects can be identified by any Board, management, staff member, consumer or stakeholder, either through feedback, or by the application of quality monitoring systems.

For further information on how to assess, minimise and treat risk, refer to the *Risk management policy.*

SECTION 2: POLICY DETAIL

Not all projects require complex levels of governance, documentation and reporting. The aim of this section is to provide guidance on how projects should be managed.

This section is supported by, and should be read in conjunction with, the **[organisation name]** *Project management lifecycle*.

### Project initiation

* All projects require a proposal to be prepared for approval by the relevant delegated authority/ies prior to the project being initiated.
* Board authorisation is **not** required if the project is clearly within the scope of **[organisation name]’s** strategic and business plans.
* Board authorisation **is** required if:
	+ - The project scope is outside of the organisation’s strategic or operational plans
	+ Costs associated with the project are >$XX,000 **[Insert amount appropriate for your organisation]**
* The project is assessed to be moderate to high risk
* The project has an anticipated duration of more than 12 months
* The project requires external partners, sponsors and/or resources
* The project requires a funding submission or business case to be prepared to obtain external funding
* Upon approval of the project proposal:
	+ A project sponsor and project manager will be allocated.
	+ If required, an appropriate governance structure will be established, including linkages to external governance structures where appropriate.
	+ A budget will be allocated, and the project included in the [**[insert organisation name]** budget](file://NADAAU/NADA%20Drive/Organisational%20Management/Governance/Governance%20Documents/NADA%20Plans/Business%20Plans) .
* Where a project is delivered in partnership with another organisation or funding body, a Memorandum of Understanding (MOU) (or similar agreement) is required, and must be signed by the relevant delegated authority from [insert organisation name]and the partner organisation.

### 2.2 Planning and design

* Projects require a project plan prior to the project being implemented.
* Projects require appropriate stakeholder engagement to be undertaken during the planning and design phase to ensure the project is acceptable to and meets the needs and requirements of intended beneficiaries.
* All projects must incorporate where relevant, appropriate level/s of consumer engagement throughout the project lifecycle.

### Implementation

* Projects will be managed using an acceptable project management methodology throughout the project lifecycle to ensure activities and tasks are outlined in sequence and outcomes/performance can be measured against established objectives.
* All projects should utilise **[insert project management system e.g. Trello, monday.com, Microsoft Teamwork, Excel]** to assign project tasks and responsibilities, track milestones, and record communication among the project team.
* Relevant stakeholders should be advised of the implementation of the project through appropriate communication channels
* A record of all project-related documents and assets should be recorded and stored electronically in the **[insert drive name and function]**, in accordance with the **[insert organisation name]** ICT policy.

### Monitoring and control

* Staff should employ appropriate techniques and processes for monitoring and controlling project parameters, including scope, quality, resources (time and budget), and risk:
	+ **[insert project management system e.g. Trello, monday.com, Microsoft Teamwork, Excel]** is utilised to monitor and control the project schedule, resource availability, progress against schedule, record issues, risks, and variations to the project plan.
	+ Expenditure will be monitored using a budget spreadsheet or a component of the project management system.
	+ If it is a longer-term project, progress reporting will be prepared measuring status against planned outcomes, budget, milestones, benefits, risks and other metrics. This will be prepared by the project manager and submitted to the project sponsor and relevant governance body/ies, during the project lifecycle.

### Closure

* An evaluation report should be completed at the end of the project
* Projects may also requier a [post implementation review report](file:///P%3A/Policies/Program%20Management%20%20Policy/Supporting%20documents/Current) to be completed and authorised by the relevant delegated authority/ies prior to project closure.
* The [post implementation review report](file:///P%3A/Policies/Program%20Management%20%20Policy/Supporting%20documents/Current) or evaluation report will report on project outcomes and benefits, recommendations, lessons learned, and any outstanding actions.
* Findings from the evaluation and post implementation review should be communicated to the team, organisation and Board as appropriate
* Where results demonstrate positive outcomes, every effort should also be made to promote the results broadly through digital communication, conference presentations, journal articles, etc.
* Upon completion and acceptance of the evaluation and/or [post implementation review report](file:///P%3A/Policies/Program%20Management%20%20Policy/Supporting%20documents/Current), the project manager should:
	+ handover any outstanding actions to those responsible for ongoing support and maintenance of project deliverables and outcomes, where relevant
	+ dissolve the project team and project governance body/ies, where relevant
	+ audit and archive project documentation, as required.

SECTION 3: REFERENCES

#### Supporting documents

* Budget overview
* Budget spreadsheet
* Communications plan
* Evaluation report - small project
* Evaluation report - large project
* Post implementation review report
* Project schedule
* Progress report - small project
* Progress report - large project
* [Project management lifecycle](file:///P%3A/Policies/Program%20Management%20%20Policy/Supporting%20documents/Current) map
* Project proposal plan - small project
* Project proposal plan - large project
* Risk management plan
* Risk management checklist
* Stakeholder engagement plan

#### Related policies and procedures

* Communications policy
* Consumer engagement policy
* Governance policy
* Risk management policy

#### Websites

* [Australian Institute of Project Management](http://www.aipm.com.au)
* [Project Management Docs](https://www.projectmanagementdocs.com/project-initiation/#axzz5T1YEzYnc) (note: this website includes advertising)