

Appendix 4

PROJECT STAGES

Process

GOOD PRACTICE CHECKLIST

Getting Started

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|--|--|
| ★ Programme and Bidding | ★ Projects based on service plans and priorities |
| ★ Establish Brief with Outputs, Resources, Time scales and Broad Costs | ★ Assess users' needs defined in "project brief"-to include objectives, standards, technical base, strategic planning and ability to finance.
★ Identify resources - funding, staff, controls and likely risks of loss/failure
★ Identify alternative strategies |
| ★ Report Scheme to Senior Management Team/Committee for approval | ★ Demonstrate how project will integrate into the corporate business plan-e.g. Service Objectives/ Strategy, Capital Programming and Functional Action Plans
★ Establish interdependencies-eg. Resource pool, effect on other events and projects |

Scope and approval

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|--|---|
| ★ Written Project Justification and Feasibility | ★ Formal Approval to plan project from Senior management Team |
| ★ Establish Organisational Team/ Project Sponsor/Project Manager | ★ Clearly define team roles and responsibilities
★ Establish support Team and role of Audit |
| ★ Set up Control Systems | ★ Set up communications and reporting procedures to Management Team, Project Team Councillors/Committee and client/end users
★ Project Manager authorises project at defined stages
★ Correct errors/mistakes immediately
★ Avoid project scope creep
★ Undertake Risk Assessment |
| ★ Identify Internal Resources-Technical and Services | ★ Establish documentary standards and monitoring procedures
★ Ensure IT support in place
★ Set programme time scale and "milestones"
★ Staffing flexibility to respond to uneven workflow-e.g. outsourcing if necessary
★ Selection of appropriate financial mechanisms for project |
| ★ Selection and Appointment of Consultants | ★ Written brief to external consultants |

Detailed design

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|----------------------------------|---|
| ★ Produce Design Options | ★ Prepare and Plan early |
| ★ Clarify Brief for Works/Plan | ★ Review risks and update register
★ Allow time for review and approval of detailed design |
| ★ Review Scheme Design and Costs | ★ Avoid late changes |

Appendix 4

	★ Consult Internally and with User Groups and Stakeholders	★ Thorough preparation prior to tender
	★ Consult with Public	★ Set up post-project asset management process
		★ Exhibitions/Newsletters etc
	★ Obtain approvals or compliance with laws, regulations, policies etc..	★ All approvals (permissions etc) have been given
		★ Designs signed off by Client/end users before specification work commences
	★ Risk Analysis	★ Cost estimates updated throughout project specification
	★ Produce Specifications/Bills	★ Provide appropriate contingencies
Procurement / Tender	★ Set procurement strategies	★ Clear procurement/tender strategy
	★ Appoint Technical Support Services	★ Internal audit informed/given approval
	★ Develop Partnership approach with Suppliers/Contractors	★ Select sub-contractors
	★ Comply with Council's Standing Orders and Financial Regulations	★ Establish risks of procurement or selection methods
	★ Review Specification	★ Use of cost planning to review scheme and budgets
	★ Shortlist	★ Get references
	★ Tender	
	★ Post-Tender Negotiations	★ Report and communicate with Management Team/Client on price and time scales
	★ Contracts/service level agreements signed	★ Contract documentation reviewed by legal prior to letting contact
	Delivering Projects	★ Project Programming
★ Monitoring costs		
		★ Identify time-critical elements
★ Control and Co-ordinate performance		★ Variations controlled
		★ Contingency planning
★ Monitoring information and Reporting		★ Establish monitoring group/officer
	★ Establish post-project management	
	★ Regular (monthly) update reports to Councillors/Stakeholders/End users	
	★ Keep all interested groups/public informed on progress, variations etc	
Project Completion and Review	★ Completion and Administrative Closure	★ Inspection for defects/failure
		★ Notice to correct failures/errors
		★ Contractors retention released on satisfactory completion
		★ Formally sign off completed project
		★ Proper project hand over to end user/client
	★ Defects Notice Period	★ Register asset
		★ Systematic post-project review
		★ Completion of final accounts promptly
	★ Final Accounts	

PROJECT MANAGEMENT & COMMUNICATIONS STRUCTURES

