

Agenda item 3

For Decision – Our approach to Project Management

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Summary incl. recommendations

The Council's Improvement Plan which was adopted in February 2025 makes a commitment to reviewing the Council's approach to project management and bringing a report to Operations & Assets Committee for approval. This report reviews current practice and recommends embedding a framework for the management of the Council's projects to guide project managers.

Recommendations:

1. To agree the approach to project management as set out in this report and the Project Initiation Document (PID) template in [Appendix 3.1](#)
2. To bring a report back to this Committee setting out costed proposals for training in project management once an overall staff training needs assessment exercise has been completed

Background

Projects are the lifeblood of the work of the Council. They are the principal means by which we effect changes that will make a difference to the lives of local people. Examples of projects that we have already delivered this year or are in progress include (the list isn't exhaustive):

- A project to deliver new play equipment in Mary Baily
- Establishing an innovative digital platform (GoVocal) to improve community participation
- Major envelope works to the Town Hall
- Putting on various community events
- The development of a Movement & Place Plan
- The production of a Frome Economic Prospectus
- A street art project
- Improvements to toilet provision and the adjoining apron in the Market Yard
- A new skatepark in Mary Baily

These projects vary in scale and complexity and to a greater or lesser extent, staff managing them have applied project management techniques that are designed to ensure that objectives are met as quickly as possible, with the minimum risk taken and the minimum of resources expended. From time-to-time, staff have received specialist training to ensure that they have the knowledge and skills to be effective. However, consistency is critical to project success. Therefore, embedding these techniques in project management work is an important part of our Improvement Programme.

The purpose of this report is to highlight the techniques that are considered to be best practice and to recommend a framework for project management in the future to be applied by project managers.

The value of scoping out a project before it begins

The bedrock of the current approach is to convene a **Project Scoping Meeting** bringing together lead councillors, the staff that are likely to be involved in delivery and where necessary key stakeholders (a crucial component in projects that involve co-designing a solution e.g. the new Mary Baily Play Area).

In general, at that Project Scoping Meeting, the objectives to be met (what success looks like and how that helps to deliver on the Council Plan and Work Programme), the timescale for delivery, the resources available (money and staff linked to the Budget & Work Programme), the tasks to be completed (in what order, when and by whom) the stakeholders to be engaged, how the project will be procured and how the project will be monitored and evaluated are all discussed and agreed before a project begins.

This is the best time to agree who the **Project Sponsor** will be (typically a lead councillor) whose role will be to hold the Why (the outcomes to be achieved) and What (the outputs of the project) and will be the champion of the project internally and externally. At the same time, it is important to determine who the **Project Manager** will be (typically a manager or lead officer within the staff team) and whose primary concerns will be with the How (the coordination of the work necessary to deliver the project) and When (the timeline for delivery – see Gantt Chart below). Lack of clarity around who is leading a project will result in a lack of oversight and work on tasks slipping through the net. Agreeing and communicating who that Project Manager will be, are vital at project initiation stage.

A tool that has traditionally been applied by staff as part of this scoping/planning process is the **Project Initiation Document (PID)**. Over time, different variants of this PID have been utilised. I have recently engaged members of the Management Team to consider what a PID should optimally include and this is presented as a form in [Appendix 3.1](#). This enables the production of a more fully formed Project Plan. It also enables the presentation of a Business Case to Council or Committee to inform decisions about projects.

A further tool used at the planning stage and to help track progress is a timeline chart. Typically, we use a **Gantt Chart**. This is illustrated in [Appendix 3.2](#) - a screenshot of the template used. This timeline chart is used to convert key activities and tasks discussed and agreed at the scoping stage into milestones and deadlines. The benefits of the Gantt Chart are that it enables the full timeline to be viewed in one place, it identifies the dependencies of one task on another and is a good way of highlighting early delays so that a course correction can be considered if required. We are working to link the PID template to a Gantt Chart so that the work on project planning is as self-contained and user friendly as possible.

Risk management

It is very easy to overlook risk management when a project is being initiated. Considering what could go wrong and how risks could be avoided or mitigated is a crucial exercise before a project starts.

Typically, risk assessment involves applying the severity of the risk and the probability of its occurrence to produce a score that defines the level of risk. It also involves clarifying the mitigation required to address the risk. The Project Plan should include a **Risk Register** bringing this together and this is highlighted in Section 4.2 of the PID template in [Appendix 3.1](#). A standard Risk Assessment template used by staff for this purpose is illustrated in [Appendix 3.3](#).

At the March meeting of Operations & Assets Committee, councillors agreed to delegate authority for the Town Clerk to work with relevant staff to achieve the following objectives:

- Ensure the council is meeting its statutory duties in relation to equality legislation
- Strengthen our approach to understanding equality impacts in decision making including developing an equality impact screening/assessment tool
- Identifying where we could further improve, embed and evidence our equalities approach across the Council's work as part of an Equalities Action Plan

Since then, an **Equality Impact Assessment (EIA)** tool has been developed and is currently being tested to inform decisions around projects we are committed to delivering. It seems appropriate that an EIA should form part of our overall approach to project management and Section 4.3 of the PID template prompts the Project Manager to indicate whether such an assessment has been completed.

Engaging Stakeholders

In general, we are well versed as an organisation in the process of engaging those who can affect or be affected by a project. We have been innovative in our approach e.g. the use of My Frome as a digital tool to reach those in the community that we wish to involve in our projects.

At the initiation stage of the project, it is important to consider the various stakeholder types and how they might be engaged and develop a **Communications & Engagement Plan** around that assessment. See Section 5.3 of the PID template which provides a prompt. Please also see [Appendix 3.4](#) which illustrates a Communications & Engagement Plan template used by staff.

Evaluation

This shouldn't be an afterthought. Evaluation should be considered right at the start of the project and it starts with understanding of what the purpose and objectives of the project are and who will be involved – see Sections 2,3 and 7 of the PID template. Only at that point is it possible to integrate how change will be evaluated.

SMART objectives are helpful in framing evaluation but not all impacts are measurable. Furthermore, the complexity of evaluation will depend on the resources at our disposal. Finally, researching similar projects will help understand the best approaches to evaluation.

Financial considerations

A crucial consideration in project planning will be the resource implications of the project (staff and money) and the opportunity cost of proceeding (the value or benefit you give up when you choose one option over another). Section 6 of the PID template requires the following to be set out:

- The budget required and the source of funding
- The staff resources required
- An indication of external funding required
- How the project will be procured

Section 3.6 of the PID template requires the opportunity cost to be set out.

Training

Whilst confidence will be built through experience, some training in the fundamentals of project management is considered to be beneficial. In the autumn, the HR Team will be undertaking an assessment of the training needs of staff generally. One consideration will be the need for individual staff to receive project management training. When this is clarified, a proposal will be brought forward for approval by this Committee.

Consultation and feedback	Consultation with Management Team on PID and Owen King on Evaluation – 14/08/26 and 17/08/26
Links to Council Plan and Medium-Term Financial Plan (MTFP)	Aim 5 of the Council Plan
Financial and Risk Implications	At this stage, implementation of this approach requires staff time only. A costed proposal for rolling out training for staff will be brought back to this Committee at a later date
Legal/HR implications	The approach set out in this report takes account of various legislative/regulatory requirements
Equalities implications	This approach links with the Council's Public Sector Equality Duty in the context of project work – an Equalities Impact Assessment will be a requirement of all project managers
Community Safety Implications	These will depend on the details of the projects to be managed

Climate Change & Sustainability Implications	Assessment of the environmental implications of a project will be an important part of project planning (see PID template)
Health & Safety Implications	To be picked up as part of Risk Management
Background papers	Improvement Plan
Report Sign-Off	Peter Wheelhouse, Town Clerk 18/08/26

Recommendations

1. To agree the approach to project management as set out in this report and the Project Initiation Document (PID) template in [Appendix 3.1](#)
2. To bring a report back to this Committee setting out costed proposals for training in project management once an overall staff training needs assessment exercise has been completed