



**South Downs**  
National Park Authority

**Agenda Item 16**  
**Report PRI0/19**

Report to	<b>Policy &amp; Resources Committee</b>
Date	<b>28 February 2019</b>
By	<b>Project Management Officer</b>
Title of Report <b>Note</b>	<b>Project Management Update</b>

**Recommendation: The Committee is recommended to receive the report and note the progress to date.**

## **1. Introduction**

- 1.1 The purpose of this report is to summarise progress with the project management system review, outline the impact on Members and next steps.
- 1.2 In November 2017 a review of the existing project/programme management system was undertaken in an internal audit by Brighton and Hove. The purpose of the audit was to review the overall control framework operating for Programme Management and a sample of individual projects. The audit outcomes identified several areas for improvement including:
- Clear communications strategies needed on projects and presence on Themed Programme Boards (TPB);
  - Project control and progress need to be captured to monitor project delivery;
  - Financial reporting on projects to be improved;
  - Progress reporting including finances and milestones to be improved;
  - Project information to be made available on the SDNPA website.
- 1.3 Following the audit report in November 2017, a new role of Project Management Officer was established and the position was filled in January 2018 by Liz Gent. One of the roles of the new Project Management Officer was to action the improvement areas outlined in the internal audit.

## **2. Why are we reviewing the Project Management System?**

- 2.1 In addition to the internal audit, an external audit was conducted on the Secrets of the High Woods, which also suggested some improvements to the way the SDNPA manages projects. Opinions were collated internally from staff across the CPM directorate on the current project management process and potential changes we could make to improve the process. As a result of the feedback from the various sources including the audit, it was clear an overhaul of the project management system was needed.

## **3. What are our objectives?**

- 3.1 To help identify our objectives for the new Project Management System, two staff workshops were held with staff representatives from Countryside and Policy Management

(CPM), the Strategic Management Team (SMT) and the Operational Management Team (OMT), Rangers, Planning, the South Downs Trust and Communications team. The workshops were facilitated by external consultants Navigation Partners over two separate days. The objectives in developing a new process for project management were agreed in the first of our Project Management workshops. These were:

- To provide clarity on the steps and process for all teams to follow.
- To have a robust pre-project planning phase.
- To have appropriate and proportional levels of authorisation and documentation – being “fit for purpose” for each project type.
- Enable successful project delivery as a result of pre-planning, approval, monitoring and governance.
- Ensuring good practise from the current process is adopted, so the new process retains best practise.
- Ensuring the new process is kept as simple as possible
- Provide a consistent and clear approach for everyone to follow.

3.2 In addition to the objectives identified for the project management system, there are also separate ‘programme management’ objectives identified from the audit, to include project progress reporting, finance reporting and project control.

#### **4. What have we undertaken to date?**

4.1 The Project Management Officer has worked with Brighton and Hove and established an improved finance monitoring system for projects, providing a clearer and consistent way of reviewing project financial information across the programme of projects being run by the SDNPA. The new finance monitoring provides greater clarity on the financial progress on all live projects and an overview of the ‘bigger picture’ of our programme of projects.

4.2 A new project management progress reporting system has been implemented, with new quarterly progress forms to provide more detail for monitoring projects and providing improved overview and governance by the Project Management Officer.

4.3 A new data visualisation software system has been introduced to replace Aspireview. The new system, Tableau, provides a more flexible and user friendly way of monitoring and managing project finances, programme, risk status and project information. The new system is more visual and interactive, and can be used on different media platforms. Tableau will be used to produce tailored dashboards going forwards to show different aspects of project management, progress and finance for different levels of reporting within the organisation such as Policy & Resources Committee, OMT and TPB. These dashboards will provide an improved quality of reporting for live projects, increased understanding of project management as well as improved monitoring, governance and risk management.

4.4 A new improved Project Shelf has been developed that links the quarterly progress reporting and Tableau together, providing an up to date record of projects, status, finances, progress and partners as well as providing information of projects in development.

4.5 A new best practice project management system has been developed to guide project development from concept to closure. This system works through 4 stages of pre-project planning, project approval and funding, project delivery and project closure. This system provides detailed templates and guidance for staff, and should enable greater clarity on how to successfully manage projects as well as enabling consistent project management across the SDNPA. The new system puts a greater emphasis on detailed project planning and design than was previously required, which will improve project management and monitoring going forwards.

#### **5. How does this impact on members?**

5.1 The project update reports produced for P&R committees will be based on information collected from the new quarterly progress forms, and new Tableau dashboards. It should provide members with improved information on projects being delivered in the Park, such

as where they are located, who the lead partners are, what the costs v completion and RAG status are for each project and a general overview of programme. This does not include projects that are delivered by partners in which the SDNPA does not have any input which will be picked up in the annual monitoring of the PMP.

5.2 Project approvals that have been to P&R Committee in the past have used the internal software Projects for the South Downs (PSD). The associated templates for these project approvals, PIDs (or project initiation documents) have been used previously to inform P&R Committee of the project details in application request for funding approval. The PSD system will no longer be used for project management and this includes project approval and funding stages. Instead, a bespoke project brief will be developed by the project manager as part of the project approval process. The project brief will document the necessary business case for the project to enable Members to make a decision on any necessary funding for projects.

## 6. Next steps

6.1 Staff training is taking place on the new project management system and templates at the end of February and early March. Guidance is being produced to support staff through the transition to the new system and processes they need to undertake.

6.2 Tableau dashboards will continue to be developed for different governance levels within the Authority to ensure an improved programme and project management understanding at all levels of the authority and across different directorates.

## 7. Other Implications

Implication	Yes*/No
Will further decisions be required by another committee/full authority?	No
Does the proposal raise any Resource implications?	No
How does the proposal represent Value for Money?	The new project management system provides a more efficient means of managing and governing our existing projects, and an improved system for designing and approving new project concepts.
Are there any Social Value implications arising from the proposal?	No
Have you taken regard of the South Downs National Park Authority's equality duty as contained within the Equality Act 2010?	Yes, there is an improved capture of the duties relating to this legislation contained in the new project management system.
Are there any Human Rights implications arising from the proposal?	None
Are there any Crime & Disorder implications arising from the proposal?	None

Are there any Health & Safety implications arising from the proposal?	No, but there is now an improved capture of this information for projects as part of the new project management system.
Are there any Data Protection implications?	No, but there is now an improved capture of this information for projects as part of the GDPR requirements in the project delivery plan as part of the new project management system
Are there any Sustainability implications based on the 5 principles set out in the SDNPA Sustainability Strategy?	None

## 8. Risks Associated with the Proposed Decision

8.1 There are very few risks associated with undertaking the new project management system (such as staff not following the procedures and process correctly), however the greatest risk is related to not undertaking this improved project management system at all. Therefore the below table relates to the risk associated with not implementing a new system.

Risk	Likelihood	Impact	Mitigation
Previous audits identified improvements needed to reduce project risks on finance, management, communications and progress reporting. No action on this would result in an ongoing risk to projects.	Without these improvements the risk of project failure and inconsistent delivery is high.	There could be a significant impact from a potential project failure if no improvements are made to our project delivery process.	The proposed changes outlined in this report provide a robust and clear project management system to undertake project management consistently and ensure improved project delivery across the organisation.

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Appendices: None  
SDNPA Consultees: Chief Executive; Director of Countryside Policy and Management;  
External Consultees: None  
Background Documents: [SDNPA Audit report](#)  
[Secrets of the High Woods evaluation report](#)