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## **Project Management System**

### **Stage 1: Project Mandate**

The submission of the Project Mandate advises the rest of the Authority of the existence of a potential project and defines its scope. Only after the project Mandate has been reviewed and approved by the relevant Programme Board is the project agreed as a priority for the Authority. Until this approval is gained, no further development should take place on the project.

Failing to secure the early approval of a Project Mandate could result in valuable time and resources being wasted.

## **On-line system and data entry**

The on-line system that went live in November 2012 is intended to enable the straight-forward input of existing Project Management System (PMS) data. Once uploaded it will be held in a secure central database and will form an essential part of the Authorities project Governance process.

In common with other PMS Gateways, the Project Mandate for a project (Gateway 1) is uploaded onto the system using a number of pre-defined pages or sections. For the Project Mandate there is a single, straightforward section that should be completed and submitted as early as possible in a project's life.

The notes that follow below are ***intended to provide a step by step guide to enable completion of the document and submission to the appropriate Project Board and Programme Board for written approval.***

## Project Mandate

**Project name** – enter the formal name of the project. This should be the name that will be used throughout the project. It is acknowledged that the title of a project occasionally changes during the lifetime of a project. However, this should be minimised to avoid confusion within the project team, the public, funders and record keeping.

**Please note** – a change in a project's name, as with any other significant change, will require the completion of a Change Request form (part of Gateway 5, Delivery document set)

**Programme (or Theme)** – identify the correct programme from the drop-down menu. The Programme Board should be the same one that will be considered future Gateways (for example Project Proposal, Gateway 2 and Business Case, Gateway 3) although occasionally projects move from one programme to another as they develop or management structures are changed.

**Link to Council Priorities (select one only)** – Many projects will respond to a number of Council Priorities. However please select only the main one that applies at this point on the form.

**What is the project?** – provide a brief description of the proposed project and identify its components.

It is appreciated that at this early stage the details of a project may not be certain.

**Why do we need it?** – outline why the project is needed, which Council priorities it will address and how this will be achieved.

**Source of idea** – identify how the project proposal has emerged. For example, this could be the result of corporate strategy, member suggestion, or a third party proposal. This helps to identify the nature of the proposal and means that as the project is developed and delivered it is possible to review its impact against the original concept.

**Project sponsor** - enter the full name and Job Title/role of the person that instigated and oversees the project. If this is Councillor or an external individual, also identify the internal senior staff member that has “ownership” of the project.

**Project manager** – enter the full name and Job Title of the internal project manager responsible for the day-to-day delivery of the project.

**Contact tel** – enter your full external telephone number, together with your internal extension.

**Email** – this is an optional field for the Project Manager’s email address to be provided. It is only relevant if the Project Manager is not completing the on-line form, refer **Email/Confirm** email below

**Project type** – check those types of project that are applicable, if necessary check the *Other* box and use the **Other** field to add relevant details of alternative project type(s).

**Completed by** – this will usually be the Project Manager, and will be populated automatically for the person completing the on-line Project Mandate.

**Email** – this will be populated automatically using the log-in details of the person completing the on-line Project Mandate. **Please note** that future notifications, including Programme Board approvals will be sent to this email address, i.e. if the Project Manager wishes to receive formal notifications they need to be the person completing the on-line Project Mandate.

**Confirm email** - this will be populated automatically as above (direct).

**Date** – this will be populated automatically by the software as you upload data.

**Save for later** – use this function if you are unable to complete the Project Mandate in one session. You will be sent an automatic email that will give you a hyper-link to log back onto the system in order to complete and submit the Project Mandate at a later date. **Please note** that the hyper-link will be sent to the person completing the on-line Project Mandate.

**Submit to** – once complete use the drop-down menu to identify the relevant Directorate Programme Manager (PDM) from the drop-down menu;

Directorate	Directorate Programme Manager (DPM)
Adult & Culture Services	Lindsey Cooper
Central Services	Andy Graham
Children's Services	Janette Brown
Environment and Regeneration	Neil Golightly

and then submit the form by pressing **Submit**. If you need to clarify any issues regarding the submitted document, contact your Directorate Programme Manager (above) in the first instance

### What happens now?

Once you have submitted the Project Mandate it will be taken to the next Programme Board by the DPM for formal review.

The Programme Board's review of the Project Mandate will be formalised and issued by the DPM in a "locked" pdf format. It will include completion of the Gateway 1 section at the close of the Project Mandate, this will place the project in one of the following categories;

- approved to proceed to Project Proposal (Stage 2);
- project not to be taken forward;
- recommended that proposal resubmitted at a later date (date will be specified);

or

- recommended that Project Proposal be submitted to a different programme (alternative programme will be identified)