

# ALL ABOUT PROJECTS

- City of York Council's guide to project management -



# Supporting you through projects

Welcome to this guide for better project management.

No two projects are the same, however by following the council's project management framework you'll be adopting a proven process and will receive lots of support to guide your project to a successful conclusion.

## A step-by-step approach



### Discovery

Where it all begins. A half-day workshop with the Innovation team to explore the needs of service users and give you the tools to start investigating potential solutions.



### Pre-Project

Working with colleagues, your ideas and business case are developed and put forward for approval.



### Initiate

Now your project has been given the go-ahead, you'll add the next level of detail to your business case and set the controls for its ongoing management.



### Plan

Give your project every chance of success by mapping out how you will achieve it and briefing stakeholders.



### Implement

Time to deliver your well-developed plans and go live with a new-look service.



### Close



# Quick Links

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[End-to-End Approach](#)

[Roles & Responsibilities](#)

## ***Overviews***

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Stage 2: [Pre-Project](#)

Stage 3: [Initiate](#)

Stage 4: [Plan](#)

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# Before you start

The basics about embarking on a new project and how this guide can help.

## What is a project?

A project is typically described as a ‘temporary group activity designed to deliver one or more product, service or result according to a specified business case.’ In other words:

- A project is **temporary** – it has a clear start and end date, and therefore defined scope and resources
- It has specified **deliverables** (services or products) that can be measured
- It has a **number of tasks** to deliver those services or products
- A project is **unique** - it is not a routine operation (business as usual), but a specific set of operations designed to accomplish one or more goals
- A **project team** often includes people who don’t usually work together – sometimes from different organisations but always with clear roles and responsibilities

## Why are we thinking differently about project management?

Like local authorities up and down the country, City of York Council is operating against an increasingly tough financial backdrop. This means revisiting everything we do and the way we do it to look for improvements and savings.

However, regardless of these financial constraints we know we need to change. Residents tell us they want services that are joined-up, easy to access, and responsive to their needs. Communities tell us they want more control over their future and their local areas.

Fast forward to 2020 and City of York Council will be markedly different to what it is now. More streamlined, focused and agile, we will be able to deliver more with less thanks to the big changes we make today. These big changes

are often delivered as projects and it's critically important they are planned, managed and governed in a consistent way. Without clear guidelines in place to support you, it's no surprise that 70% of projects in industry are said to fail.

Thinking differently about Project Management will greatly increase the chances of a project's success. This translates to greater benefits for the people of York as we deliver better, more productive services and solutions and reduce staff stress and inefficiencies along the way.

## **How will it help me?**

First and foremost, following this project management guidance will give your project greater chance of success.

It has been written in such a way as to smoothly guide you through every stage of your project's life, from idea to implementation and completion. Clear checklists and gateways are there to ensure documentation is up-to-date, any issues are identified and resolved, and you receive the support you need to keep everything on track.

As project manager, this structure also helps you to communicate a project's purpose and status when required. This can be particularly useful when briefing or updating stakeholders, such as the project board, service area, Members or the executive team. It can also help to avoid scope creep - *the process by which a project grows beyond its original shape and size*. Projects that are clear about what will be delivered, by when and with what resource will be more likely to work out that way.

## **What principles are we working to?**

In short, all City of York Council projects rely on openness, honesty and enthusiasm to engage if they are to run smoothly and deliver the outcomes originally anticipated. This means:

- ensuring our effort is proportionate, effective and consistent with recognised good practice
- securing a mandate for the work and gain senior management commitment

- assigning clear roles and responsibilities and defined levels of delegated authority
- recording the benefits we want to achieve and evaluating our success
- identifying, assessing and managing any risks involved
- developing a plan showing when objectives will be met, providing assurance and reviewing activities
- identifying the financial requirements and other resources needed to meet project objectives
- identifying those affected by the work and engaging them throughout
- ensuring the transition to business as usual is efficient and effective
- recording lessons learned and sharing them with others

## **Why have Gateways been introduced?**

An effective gateway process is the key to successful project delivery. Each gateway is a short, focused review that occurs at key decision points before the project is allowed to progress to the next stage. They are conducted by experienced practitioners independent of the project team who ensure that the original business case, the project objectives and expected benefits continue to be achieved throughout the lifecycle of the project. The reviews also highlight risks and issues, which if not addressed would threaten successful delivery.

A project must have robust documentation and be deemed on track in terms of being able to deliver its objectives in order to “pass through” the gateways.

## **Who is this relevant to?**

Whilst primarily aimed at project managers, this guide is relevant to anybody the project might touch. This could be the wider project team or sponsor, a team or individual who is asked to contribute in some way, or a senior executive or elected member.

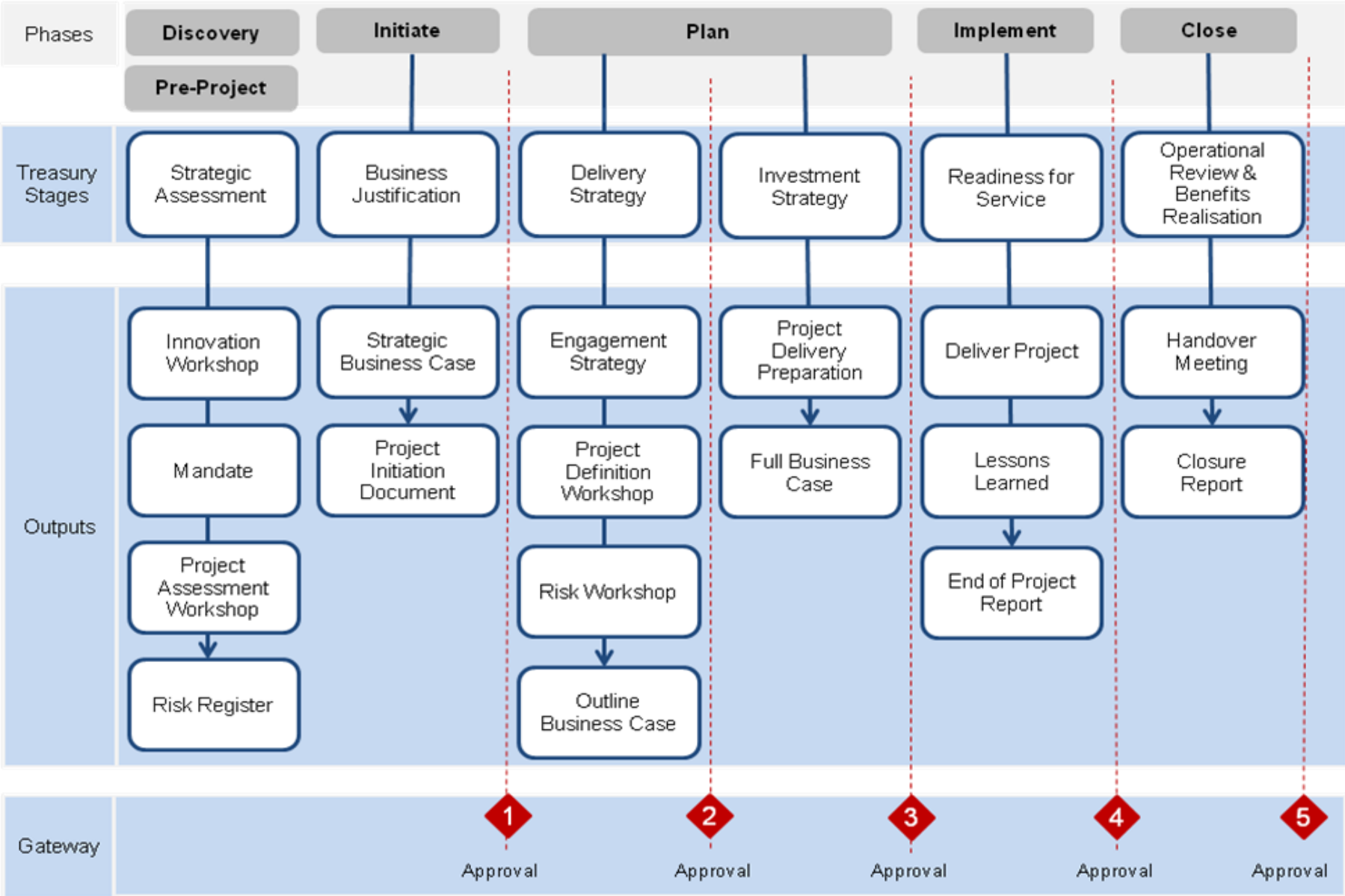
The support and commitment of all of these groups throughout the project’s lifecycle is critical to its success.

## **Who can I turn to for assistance?**

The following pages go into more detail on the six stages of any project. In addition to the overall support from your project team and board, each stage includes key contacts and departments that you can call on for specific information or guidance.

# End-to-End Approach





# Roles & Responsibilities

Every project is a team effort involving many groups of people in its planning, management, governance and ultimate implementation.

The **Project Team** is the group responsible for the planning and execution of the project. It consists of a **Project Manager** who leads project planning and reporting, and a number of Project Team members who are brought in to deliver clear tasks, such as user engagement or cost/benefit analysis.

The [Project Sponsor](#) is typically a senior executive with demonstrable interest in the outcome of the project who is ultimately responsible for approving its business case and resources.

The [Project Board](#) provides direction and management for the project and is the overall authority that is accountable for its success or failure.

The role of the [Gateway Review Team](#) is to gather and analyse the information made available by the project during a gateway review, and to make a proposal on whether the project can proceed to the next phase (or finally close).

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| <p>Stage 1:</p> <h2>Discovery</h2>  | <p>Before you start planning in detail it's important you take the time properly explore the problem and the range of possible solutions with stakeholders, including other departments. This means lots of user research, service stories and co-created delivery models.</p>   |
| <p><b>Contents</b></p> <ul style="list-style-type: none"> <li>- Objectives</li> <li>- Evidence</li> <li>- Outcomes</li> <li>- Assistance</li> <li>- Check-list</li> </ul> | <p><b>Objectives</b></p> <p>The discovery phase involves engaging service users to better understand and articulate their needs. It begins with a half-day workshop with your project team and your assigned Innovation Project Manager. The internal and external context this provides helps to refine initial ideas and assumptions before co-creating prototypes of potential solutions.</p> <p>In taking an open and collaborative approach throughout the project you will develop a common understanding of what the current state of the service is and what, if any, change is required before you produce a Full Business Case and ask for resources.</p> <p><b>Evidence</b></p> <p>Proof of concept comes from talking with users and frontline staff and putting yourself in their shoes. This can be in the form of:</p> <ul style="list-style-type: none"> <li>• workshops</li> <li>• user stories</li> <li>• focus groups</li> </ul> <p>The resulting ideas will be explored via:</p> <ul style="list-style-type: none"> <li>• whiteboard diagrams</li> <li>• paper prototypes</li> <li>• service design mock-ups</li> </ul> <p>You are expected to record your engagement methods and feedback at this stage to help validate your business case.</p> <p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• a clearly-defined problem based on user needs</li> <li>• co-created solutions for testing</li> </ul> |

- stakeholder engagement and buy-in

### **Assistance**

Contact Monica Naore, Innovation Project Manager, to book your half-day innovation workshop.

The council's [\*Innovation Space\*](#) (West Offices, floor 3) is a fully equipped creative environment away from your team area in which to foster new ideas and gather insight.

### **Check-list**

Innovation Workshop completed

[ ]

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| <p>Stage 2:</p> <p><b><u>Pre-Project</u></b></p>   | <p>This is your opportunity to put your idea forward for approval. You are expected to build a picture of the need for the change and start a sound business case. Colleagues from ICT, Finance and Procurement and HR are on hand to assist you.</p>   |
| <p><b>Contents</b></p> <ul style="list-style-type: none"> <li>- Objectives</li> <li>- Evidence</li> <li>- Outcomes</li> <li>- Assistance</li> <li>- Check-list</li> </ul> <p><b>Documents</b></p> <ul style="list-style-type: none"> <li>- <a href="#">Mandate</a></li> <li>- <a href="#">Project Assessment Workshop</a></li> <li>- <a href="#">Project Assessment Matrix</a></li> <li>- <a href="#">Risk Register</a></li> </ul> | <p><b>Objectives</b></p> <p>The pre-project phase will give those around you a high-level understanding of the project and its intended benefits. The business case will start to become clear and stakeholders will input into the evidence required.</p> <p>Projects are not considered live until passing through this gateway.</p> <p><b>Evidence</b></p> <p>The high-level case for action will go in your <a href="#">Mandate</a> form. This is based on a template and must contain all the information a project sponsor would need to make a decision on the early-stage viability of the project, including evidence of user needs and target outcomes.</p> <p>From there a <a href="#">Project Assessment Workshop</a> takes place, where the idea is explored in more detail and introduced to a wider group of stakeholders. It is during this exercise that the <a href="#">Project Assessment Matrix</a> and the initial <a href="#">Risk Register</a> will be completed. These items will inform any updates required to the Mandate.</p> <p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• A decision from the sponsor to progress to the next stage</li> <li>• Appointment of a Project Manager</li> </ul> <p>Please note it is unlikely that you will be able to answer all of the questions at this stage, however by undertaking the process it will help to test and refine the assumptions and early focus of the project.</p> |

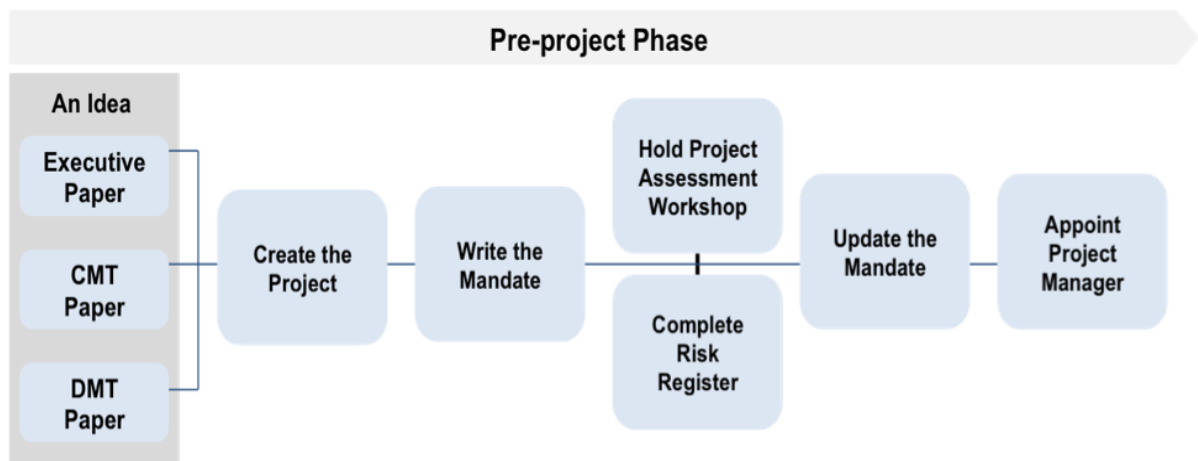
**Assistance**

Whilst the nominated individual will lead this stage it is very much a team exercise. Colleagues from ICT, Finance and Procurement and HR will help to build your case and need to be active participants in the Project Assessment Workshop.

If you would like assistance in planning your first Workshop, please contact Monica Nagore, Innovation Project Manager.

**Check-list**

- Completed Mandate form [ ]
- Completed Project Assessment Workshop [ ]
- Completed Project Assessment Matrix [ ]
- Completed Risk Register [ ]
- Project Sponsor sign-off [ ]
- Project Manager appointed [ ]



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| <p>Stage 3:</p> <p><b><u>Initiate</u></b></p>  | <p>Congratulations your project can now start.</p> <p>The initiate phase adds the next level of detail to your business case and sets the controls for its ongoing management. Your project sponsor is the key stakeholder in this short phase.</p>   |
| <p><b>Contents</b></p> <ul style="list-style-type: none"> <li>- Objectives</li> <li>- Evidence</li> <li>- Outcomes</li> <li>- Assistance</li> <li>- Check-list</li> </ul> <p><b>Documents</b></p> <ul style="list-style-type: none"> <li>- <a href="#">Business Case template</a></li> <li>- <a href="#">Project Initiation Document template</a></li> <li>- <a href="#">Gateway Approval 1 Review template</a></li> </ul> | <p><b>Objectives</b></p> <p>As project manager you are expected to develop more detailed evidence for the project against core business aims and council priorities. This enables an objective assessment of the merits of the project and the resources allocated to its delivery.</p> <p>This phase also introduces you to Verto, the council's Project Management System.</p> <p><b>Evidence</b></p> <p>The Mandate from the previous phase is developed into a Strategic <a href="#">Business Case</a>. Once agreed, this evolves into the outline business case, considering the range of options available, and then a Full Business Case, outlining the preferred delivery option. The level of information required in the business case will vary depending on the level of scale and complexity of your project.</p> <p>The headline information from your business case then forms the basis of a <a href="#">Project Initiation Document</a>. This is the key contract between you, the project manager, and the project board.</p> <p>It's now time to register and upload the project plan on Verto before the <a href="#">Gateway Approval 1 Review</a>.</p> <p>Remember, there are established rules and procedures for any procurement activity that is required. See the <a href="#">CYC Procurement Toolkit</a> for guidance.</p> <p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• Project Plan uploaded to Verto</li> <li>• Formal written approval to proceed is given by the project board (medium/large projects) or project sponsor (small)</li> <li>• Resources - staff and finance - allocated to the project</li> </ul> |

## Assistance

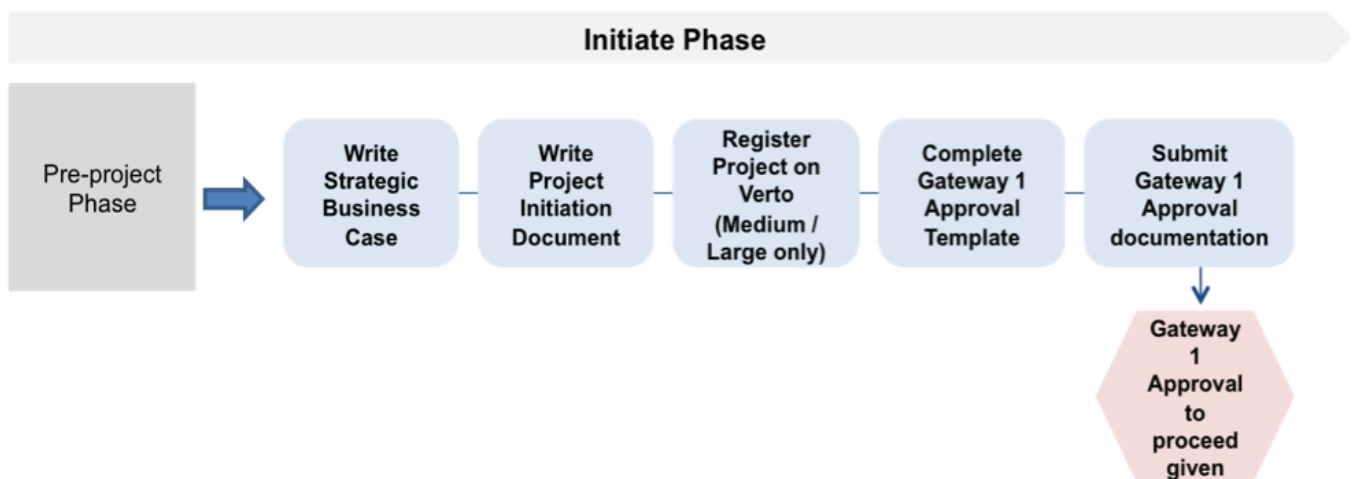
As part of your initiation into the project, the project sponsor will talk you through the mandate and project assessment matrix completed in the previous phase of the project.

When it comes to developing the business case and project initiation document colleagues from ICT, Finance and Procurement and HR are again on hand to help.

Verto training and guidance is provided by Stephen Lornie, Office of the Chief Executive.

## Check-list

|                               |     |
|-------------------------------|-----|
| Business Case completed       | [ ] |
| Project Initiation Document   | [ ] |
| Gateway Approval 1 submission | [ ] |
| Project uploaded to Verto     | [ ] |

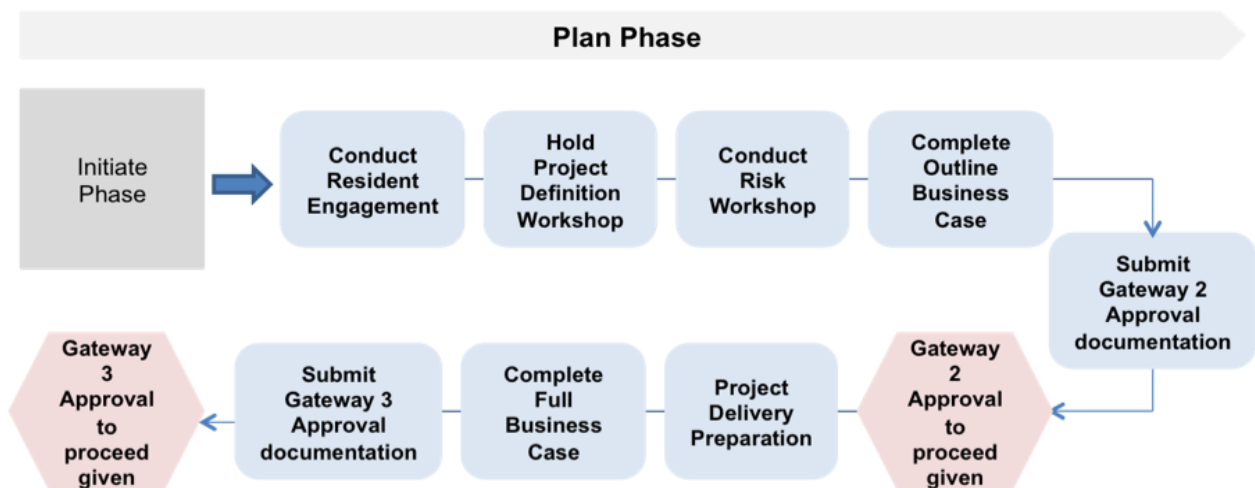




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| <p>Stage 4:</p> <h2>Plan</h2>   | <p>You're embarking on a project, but what's due to happen and when? Answering questions like these makes this the most detailed phase but the time you invest in planning upfront will give your project greater chance of success.</p>   |
| <h2>Contents</h2> <ul style="list-style-type: none"> <li>- Objectives</li> <li>- Evidence</li> <li>- Outcomes</li> <li>- Assistance</li> <li>- Check-list</li> </ul> <h2>Documents</h2> <ul style="list-style-type: none"> <li>- <a href="#">Engagement Strategy template</a></li> <li>- <a href="#">Project Definition Workshop</a></li> <li>- <a href="#">Stakeholder Map template</a></li> <li>- <a href="#">Risk Workshop</a></li> <li>- <a href="#">Project Plan</a></li> <li>- <a href="#">Communication Plan</a></li> <li>- <a href="#">Benefits Realisation Plan</a></li> <li>- <a href="#">Project Controls</a></li> <li>- <a href="#">Sample Excel Project Plan</a></li> <li>- <a href="#">Sample Microsoft Project Plan</a></li> <li>- <a href="#">Critical Path Analysis</a></li> </ul> | <h2>Objectives</h2> <p>The Plan Phase is when you turn the idea for the project into a clear plan for how you will achieve it. It is also the opportunity to make sure that all the people involved in the project, or will be affected by it, fully understand what it will achieve and what is expected of them.</p> <p>The detailed plans and budgets you produce will be an invaluable resource throughout the project and will determine how progress is reported. Plenty of support is available to help you through this phase.</p> <h2>Evidence</h2> <p>As residents are at the heart of all our decision-making, you will begin by developing an <a href="#">Engagement Strategy</a>. The council's <a href="#">Approach to Community Engagement</a> is a useful resource here and training is available if you need more help with planning and organising your engagement sessions.</p> <p>Next, the <a href="#">Project Definition Workshop</a> advances your initial project idea by involving internal and external stakeholders in discussions about the project. The workshop will build on the information gathered at the project assessment workshop held in the Initiate phase and the strategic business case. Key outputs are your <a href="#">Stakeholder Map</a>, the <a href="#">Equality Impact Assessment</a>, Privacy Impact Assessment and Key Dates.</p> <p>Holding a <a href="#">Risk Workshop</a> provides you with an opportunity to examine your risk register again in greater detail, identifying any new risks and coming up with solutions to address them. You should invite key stakeholders to the risk workshop, including HR, ICT and Finance and Procurement.</p> <p>These documents feed into a more up-to-date Outline Business Case, accompanied by a <a href="#">Project Plan</a>, <a href="#">Communication Plan</a>,</p> |

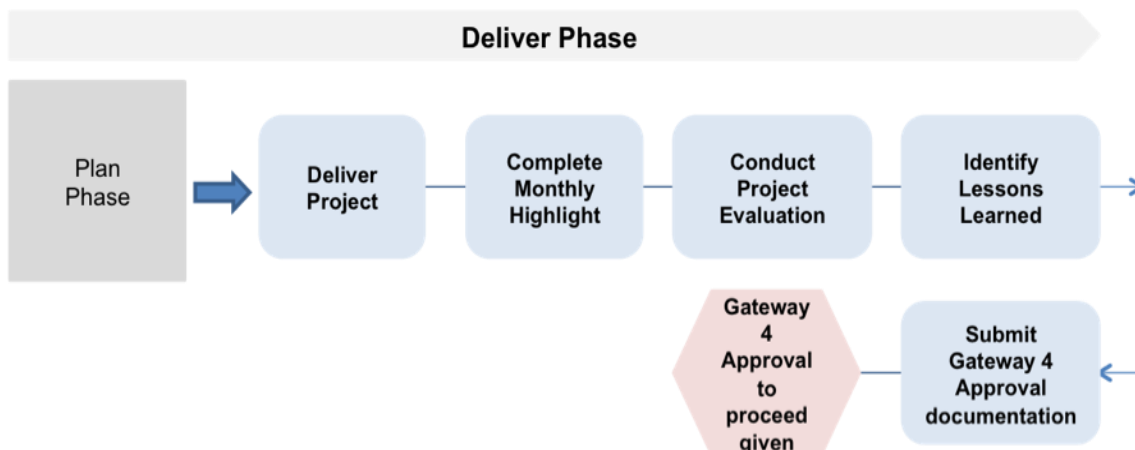
| <ul style="list-style-type: none"> <li>- <a href="#">Highlight Report</a></li> <li>- <a href="#">Full Business Case &amp; Change Request form</a></li> <li>- <a href="#">Gateway 2 Approval Review</a></li> <li>- <a href="#">Project Delivery preparation</a></li> <li>- <a href="#">Gateway 3 Approval Review</a></li> </ul> | <p><a href="#">Benefits Realisation Plan</a>, <a href="#">Project Controls</a> and a <a href="#">Highlight Report</a>. Larger and more complex projects may also need to undertake <a href="#">Critical Path Analysis</a>.</p> <p>Now you're ready for the <a href="#">Gateway 2 Approval Review</a>. This review aims assesses the Plan phase so far and checks whether the outline business case and project plan meet expectations. If appropriate, this review will also assess whether your project is ready to invite proposals or tenders from potential suppliers.</p> <p>Once approval is granted the <a href="#">Project Delivery preparation</a> begins as you get ready to start implementing your project, ahead of the full business case being agreed. This includes setting up the financial tracking for the project, ensuring continued risk management, and introducing a lessons learned log and issues log.</p> <p>Lastly, the <a href="#">Full Business Case</a> provides the basis for moving forward into the implementation phase of your project. This is decision is taken at the <a href="#">Gateway 3 Approval Review</a>.</p> <p>Be prepared for a rigorous few weeks of planning with colleagues to get your project ready for the delivery phase.</p> <h3>Outcomes</h3> <ul style="list-style-type: none"> <li>• Robust plans are approved and uploaded onto Verto</li> <li>• Formal approval to proceed to project delivery is granted by scrutiny</li> </ul> <h3>Assistance</h3> <p>If you need help the following people can be contacted:</p> <table border="1" data-bbox="564 1503 1481 2076"> <thead> <tr> <th>Area of Expertise</th> <th>Contact</th> </tr> </thead> <tbody> <tr> <td>Risk</td> <td>Lisa Nyhan</td> </tr> <tr> <td>Finance</td> <td rowspan="3">Debbie Mitchell</td> </tr> <tr> <td>Procurement</td> </tr> <tr> <td>Business Case</td> </tr> <tr> <td>Human Resources</td> <td>Mark Bennett</td> </tr> <tr> <td>Legal</td> <td>Glenn McCuster</td> </tr> <tr> <td>Communications</td> <td>Debbie Manson</td> </tr> <tr> <td>Project planning</td> <td>Stewart Halliday</td> </tr> <tr> <td>Engagement with residents, communities, staff and partners</td> <td></td> </tr> </tbody> </table> | Area of Expertise | Contact | Risk | Lisa Nyhan | Finance | Debbie Mitchell | Procurement | Business Case | Human Resources | Mark Bennett | Legal | Glenn McCuster | Communications | Debbie Manson | Project planning | Stewart Halliday | Engagement with residents, communities, staff and partners |  |
|--|---|-------------------|---------|------|------------|---------|-----------------|-------------|---------------|-----------------|--------------|-------|----------------|----------------|---------------|------------------|------------------|--|--|
| Area of Expertise  | Contact   |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Risk   | Lisa Nyhan  |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Finance  | Debbie Mitchell   |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Procurement  |   |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Business Case  |   |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Human Resources  | Mark Bennett  |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Legal  | Glenn McCuster  |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Communications   | Debbie Manson   |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Project planning   | Stewart Halliday  |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |
| Engagement with residents, communities, staff and partners   |   |                   |         |      |            |         |                 |             |               |                 |              |       |                |                |               |                  |                  |  |  |

|  |                            |               |
|--|----------------------------|---------------|
|  | Equality Impact Assessment | Mary Bailey   |
|  | Privacy Impact Assessment  | Lorraine Lunt |
| <p><b>Check-list</b></p> <p>Engagement Strategy completed [ ]</p> <p>Project Definition Workshop completed [ ]</p> <p>Full Business Case completed [ ]</p> <p>All documentation submitted to Approval Review [ ]</p> |                            |               |



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| <p>Stage 5:</p> <h2>Implement</h2>  | <p>Time to deliver your well-developed plans and go live with a new-look service.</p> <p>As project manager you take on a slightly different role to previous phases; facilitating and reporting progress, preparing services for change, resolving development challenges and managing risk and budgets.</p>  |
| <p><b>Contents</b></p> <ul style="list-style-type: none"> <li>- Objectives</li> <li>- Evidence</li> <li>- Outcomes</li> <li>- Assistance</li> <li>- Check-list</li> </ul> <p><b>Documents</b></p> <ul style="list-style-type: none"> <li>- <a href="#">End of Project Report</a></li> <li>- <a href="#">Gateway 4 Review Process</a></li> </ul> | <p><b>Objectives</b></p> <p>The Implement Phase is all about building an end-to-end solution.</p> <p>With capacity negotiated in the service area, your project team will start to build, test and review staggered iterations of the final project, making sure to feed in new learnings along the way.</p> <p>You'll be regularly updating stakeholders with progress and measuring performance against the agreed KPIs.</p> <p>Successful implementation will see the project delivered on time and to budget and generating the intended benefits as it is integrated into core business.</p> <p><b>Evidence</b></p> <p>Your Project Plan is your main reference point for the journey ahead. Regular project team meetings to discuss progress, evaluate blocks of work, and address issues can help you to be alert to deviations from this document. There may also be times when a special meeting is required when something unexpected happens and actions need to be discussed and agreed.</p> <p>Keeping a close eye on your project in this way will assist you when compiling the Monthly Highlight Report for your project board.</p> <p>During the delivery phase of your project it is important that earlier documentation is kept up-to-date. This includes the full business case, communication plan, issues log and risk register.</p> <p>As your project comes to a close you should prepare an <a href="#">End of Project Report</a>. This is presented as part of <a href="#">Gateway 4 Review Process</a> with the Lessons Learned Report (based on your lessons</p> |

|  |   |                                       |     |                                 |     |                                  |     |  |     |
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|  | <p>learned log) and is also used by the project board to assess the success of the project, inform future projects and finalise any loose ends.</p> <p>The Review ensures that everything is in place to hand over operations to the service areas, and that ownership arrangements and governance are in place.</p> <p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• Delivered an end-to-end solution of the service with allocated resources</li> <li>• Met the needs and realised the benefits identified upfront</li> <li>• Tested it with end users and service areas, optimising accordingly</li> <li>• Presented the project board with the evidence to sign off the project as finished</li> </ul> <p><b>Assistance</b></p> <p>Your project sponsor and the transformation team (Stewart Halliday) will assist you with this Stage.</p> <p><b>Check-list</b></p> <table style="width: 100%; border: none;"> <tr> <td>Monthly Highlight Report(s) completed</td> <td style="text-align: right;">[ ]</td> </tr> <tr> <td>End of Project Report completed</td> <td style="text-align: right;">[ ]</td> </tr> <tr> <td>Lessons Learned Report completed</td> <td style="text-align: right;">[ ]</td> </tr> <tr> <td>Documentation for Gateway 4 Review submitted</td> <td style="text-align: right;">[ ]</td> </tr> </table> | Monthly Highlight Report(s) completed | [ ] | End of Project Report completed | [ ] | Lessons Learned Report completed | [ ] | Documentation for Gateway 4 Review submitted | [ ] |
| Monthly Highlight Report(s) completed        | [ ]   |                                       |     |                                 |     |                                  |     |  |     |
| End of Project Report completed              | [ ]   |                                       |     |                                 |     |                                  |     |  |     |
| Lessons Learned Report completed             | [ ]   |                                       |     |                                 |     |                                  |     |  |     |
| Documentation for Gateway 4 Review submitted | [ ]   |                                       |     |                                 |     |                                  |     |  |     |



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| <p><b>Stage 6:</b></p> <p><b>Close</b></p>   | <p>Congratulations, your project is now integrated into the everyday operations of the council.</p> <p>Your final tasks as project manager are to assist with a handover to the service area and the overall evaluation of the project.</p>   |
| <p><b>Contents</b></p> <ul style="list-style-type: none"> <li>- Objectives</li> <li>- Evidence</li> <li>- Outcomes</li> <li>- Assistance</li> <li>- Check-list</li> </ul> <p><b>Documents</b></p> <ul style="list-style-type: none"> <li>- <a href="#">Handover Meeting Agenda Template</a></li> <li>- <a href="#">Project Closure Report Template</a></li> <li>- <a href="#">Gateway 5 Review Template</a></li> </ul> | <p><b>Objectives</b></p> <p>The objective of this phase is to bring the project to a formal close.</p> <p>It is a good time to celebrate the successes of the project and reflect on the lessons learned. Perhaps the most important question here is: ‘would we do this again in the same way?’</p> <p>In transferring ownership to the service area, you will track whether the anticipated benefits at this stage are being realised and confirm sufficient resources are in place for their ongoing delivery.</p> <p><b>Evidence</b></p> <p>The previous Gateway may have highlighted tasks that need to be completed before your project is ready to be handed over. Once these have been completed the project can be handed to the service area at a <a href="#">Handover Meeting</a>. This is a good opportunity for the project team to answer any questions they might have and to provide any legally required documentation e.g. related to a policy change, compliance with statutory legislation, or health and safety.</p> <p>The <a href="#">Project Closure Report</a> is the final document you will produce. It assesses the success of the whole project, including the operational running of the changes since handover and the views of service users, residents, staff and partners.</p> <p>Finally, the <a href="#">Gateway 5 Review</a> confirms that the project was delivered to plan, that outputs have been achieved, and that benefits and outcomes have been realised.</p> <p><b>Outcomes</b></p> <ul style="list-style-type: none"> <li>• Ownership transferred to a fully trained and equipped</li> </ul> |

|                                  |  |                       |     |                                |     |                        |     |                                  |     |
|----------------------------------|--|-----------------------|-----|--------------------------------|-----|------------------------|-----|----------------------------------|-----|
|                                  | <p>Service Area</p> <ul style="list-style-type: none"> <li>• Project evaluated and benefits beginning to be realised</li> <li>• Lessons learned inform future projects</li> <li>• Project signed-off and contractors engaged on the project formally released</li> </ul> <p><b>Assistance</b></p> <p>Your project sponsor and the transformation team (Stewart Halliday) will assist you with the handover process and final gateway report.</p> <p><b>Check-list</b></p> <table style="width: 100%; border: none;"> <tr> <td>Handover Meeting held</td> <td style="text-align: right;">[ ]</td> </tr> <tr> <td>Project Closure report written</td> <td style="text-align: right;">[ ]</td> </tr> <tr> <td>Lessons learned shared</td> <td style="text-align: right;">[ ]</td> </tr> <tr> <td>Gateway 5 Approval Review passed</td> <td style="text-align: right;">[ ]</td> </tr> </table> | Handover Meeting held | [ ] | Project Closure report written | [ ] | Lessons learned shared | [ ] | Gateway 5 Approval Review passed | [ ] |
| Handover Meeting held            | [ ]  |                       |     |                                |     |                        |     |                                  |     |
| Project Closure report written   | [ ]  |                       |     |                                |     |                        |     |                                  |     |
| Lessons learned shared           | [ ]  |                       |     |                                |     |                        |     |                                  |     |
| Gateway 5 Approval Review passed | [ ]  |                       |     |                                |     |                        |     |                                  |     |

