

GUIDANCE FOR PROJECT LEADERS



1. INTRODUCTION

Ripon Together activities are partly based around 'projects' - defined packages of work with clear aims and objectives, and usually a known end point. Some activities will continue in the longer term; once things are established these will be redefined as 'ongoing activities' and the original project closed.

Ripon Together has a growing number of active members. This guidance aims to apply to both projects that members bring forward as well as those initiated by the Board. At any one time there may be several projects in which Ripon Together is engaged.

It is important for Ripon Together to be seen as active and adding value, and to be operating effectively and professionally. We therefore need a formal structure to approve and monitor activities done in our name. It is also necessary for the Board to approve a clear statement of the objectives and budget of any project so that those leading the project have clear boundaries for their actions.

2. HOW DOES A PROJECT COME ABOUT?

We do not currently canvass for ideas for projects from members or the wider community, though increasingly some come up through that route. Mostly, projects are identified by Board members and the detail of what they can deliver is then developed through community meetings.

These give members the opportunity to put forward their own ideas, explore how their plans fit in with others, how they can help deliver the ideas that come up, or express any reservations. They also help identify the people and other resources that will help deliver the outcomes.

Where this is the way the project is being developed it is therefore not normally possible to present a complete project proposal form to the Board until after one or two of these meetings. However, it remains important to do so as early as possible to ensure formal approval before commitments are made and to protect Ripon Together's reputation.

The template Project Proposal Form is in the shared dropbox. If we became a more bottom up organisation in this area, we would make the forms available on the website and encourage members to come forward with ideas using the form as the initial vehicle.

3. THE PROJECT PROPOSAL

The Project Proposal Form ensures that projects are thought through properly before too much time and effort has been expended. Once approved, the Project Proposal Form is in effect the approval from the Board to proceed on the identified budget. It defines exactly what work is to be carried out, who will do it, where the funding will come from and what it is hoped will be achieved.

People must not embark on activities in the name of Ripon Together until the proposal has been approved by the Directors.

The form also helps to manage mission creep, which could otherwise lead to extra spending or duplication with other projects led by Ripon Together or other bodies. If proposals change in any significant way, or the sums involved are expected to be different, a revised form should go to the Board for approval.

4. AIMS AND SUCCESS CRITERIA

It is important that projects produce real benefits (even if they are intangible). The aims of a project can be quite general or very specific, but they must fit with Ripon Together's purpose and objectives. The purpose of Ripon Together is to bring people and bodies together to make Ripon a better place to live. More formally, its aim is to improve the community, economic and environmental sustainability of the city.

The success criteria identified for the project should be much more specific. Ideally, the outcomes will be quantifiable - numbers of people attending an event, items sold, members recruited etc - as well as other objective measures such as positive press coverage or feedback.

5. THE PROJECT TEAM

It is preferable for a project to be run by more than one person - there is usually a team.

When recruiting a team it is important to ensure that you have the necessary skills, or know where you can get help. There is a list of skills that might be required at the end of the Project Proposal Form template. It is not exhaustive, a project may need skills and experience that are not listed there.

Good communication is paramount. The Project Leader needs to know what team members are doing, that they are doing what they promised to do and aren't going off on a tangent doing something different. All team members need to be clear about the boundaries of the project and their role and tasks. Meetings should be minuted and those notes sent to attendees, potentially other people involved in the project, and lodged in the Ripon Together dropbox.

The Project Leader is responsible for making sure that the project is delivered as agreed in the Project Proposal. That means ensuring the Board has approved what is intended and that the team is delivering what is intended.

6. PUBLICITY AND PROMOTION

A project will almost certainly entail external communications - on the website, on social media, in the press and on the radio, by means of fliers, posters and banners, by letters to specific organisations and individuals. It is important that all such publicity meets acceptable standards, and that Ripon Together branding is used in an appropriate way.

The content of, and dissemination strategy for, any external communications should be agreed by at least the Board members involved in the project and the board member leading on communications.

Communications will often contain quotes from Board members to increase impact and tell the story more directly. Any quotes should be agreed with the person to whom they are ascribed.

If your project needs an e-mail address to facilitate input from other groups or the general public, it should be possible to either use the info@ripontogether.com account or to create a specific address for the project. This should be arranged through the Board member responsible for communications.

7. LICENSING, INSURANCE, HEALTH & SAFETY

Some projects will require a licence or licences from Harrogate Borough Council or North Yorkshire County Council. Most activities will be covered by our Public Liability Insurance, but major events might need separate insurance cover. If it is possible that such cover is needed, the issue should be discussed with the Board member leading on finance and the costs should be reflected in the Project Proposal Form for Board approval.

It is likely that a formal health and safety risk assessment will be needed for any event. It is sensible to check what has been done for previous projects as it is likely there will be examples that are relevant to current projects.

8. FINANCES AND FUNDING

Many projects will involve some sort of expenditure.

The Directors need to know what the likely costs, and their timing, are before they agree that the project can go ahead. The Project Proposal Form should contain as good an estimate as possible, based on quotations, known costs of similar past expenditure and so on; the board member responsible for finance will be able to help with this. It may be that knowledge of costs will be refined in the course of the project. It is good practice to provide a revised Project Proposal Form to the Board where this is the case, but in any case where the costs exceed those previously approved this becomes a necessity.

Costs should be kept to a minimum. Ripon Together is well thought of, and you may be able to persuade local companies to offer donations in kind, for good or services, or discounted rates.

No member of the project team can be paid for work on a Ripon Together project. In very rare circumstances it may be that a Ripon Together member is asked to tender for a specific job, in their professional capacity; it would have to be agreed in advance with the Directors that this was appropriate.

Ripon Together usually expects projects to cover their own costs. Some projects may have the potential to generate an income, by selling tickets, charging for stall space or similar. Others do not, or the income may not be enough to cover the full cost.

Funding or support in kind can be sought from the various grant giving bodies, corporate community funds, local businesses or community groups. Any such approach must be agreed by the Board in advance in case the individual or organisation you have in mind is being asked by someone else to help with another Ripon Together activity.

The Directors will agree a budget for the project when they approve it. This may be an outright agreement to pay for the project, or it may be an agreement to underwrite the project up to an agreed amount, in the event that income or external funding is less than anticipated. Underspending is welcome, so long as objectives are still met, as any spare funds can be used on other projects.

Where possible, goods and services should be paid for by Ripon Together, to be arranged through the Board member responsible for finance. If this is not possible, personal expenses can be claimed back, again via the Board member responsible for finance. Receipts should be provided. Project managers should ensure they keep track of any expenses incurred by other members of the project team as these will go against the budget approved in the Project Proposal Form.

We do not accept paid for advertising on our promotional materials, website or social media. We are happy to acknowledge sponsorship, whether financial or donations in kind, by including an organisation's name and/or logo in the project's publicity materials.

9. REPORTING AND EVALUATION

The Board needs to be told of any variance from the plan set out in the approved Project Proposal Form. There are monthly updates (except in August, and November when we have the AGM) on each project at each Board meeting.

Where a project has involved many people or bodies, it is good practice to hold a 'debrief' meeting with everyone involved in the project as soon as possible while things are still fresh in people's minds to assess what went well, what didn't and how to improve in future. The lessons learned should be communicated to the Board.

At the end of the project, there should be a formal Closing Report. That should pick up any such lessons, review how successfully the objectives of the project were met, and review the financial outcome. Once signed off by the Board, this should also be lodged in the relevant project folder in the Ripon Together dropbox.

Project Manager Guidance v.3 revised and adopted
July 2022