



# Project Management Policy and Procedure

## Overview

Green Leaf Café staff will use this policy and procedure for managing projects undertaken at Green Leaf Café.

Policy Number: 2021909

Policy Date: 09/08/2021

## Purpose

The purpose of this policy and procedure is to provide guidelines that clearly communicate to Green Leaf Café staff the requirements for managing projects at Green Leaf Café.

## Scope

The Project Management Policy and Procedure is applicable to all employees who are involved with managing projects on behalf of Green Leaf Café. This applies to any project that requires financial and human resources to be allocated to the project.

## Principles

Green Leaf Café follows the PLOC managerial principles:

- **Plan:** establish an overall plan for the implementation of your project
- **Lead:** lead the project team towards your objectives and goals
- **Organise:** organise your resources and initiate project activities
- **Control:** track and monitor the progress against the initial project plan.

## Lines of authority and approvals

The line of authority and approvals lies with Gary Aziz the co-owner of Green Leaf Café. Gary Aziz will typically be the sponsor and the delegating authority. In some cases, the Green Leaf Café Manager may perform these roles.

## Quality assurance

Quality assurance of projects implemented at Green Leaf Café consists of:

- making sure that our processes address the issue of project outcomes and meeting project stakeholders' standards
- setting milestones for completing a deliverable, making sure that deliverables are up to standards through quality metrics or performance indicators
- assigning individuals to check on quality of deliverables and work tasks
- setting timelines for checking the quality of a deliverable
- reviewing projects, documenting lessons learned from undertaking the project and recommendations for improving project processes.

## Budgets and finance

All projects must be budgeted. If the budget is more than \$1,500 the budget must be itemised in the project plan and approved by the Green Leaf Café Manager. Budget is the total projected costs to complete a project within a timeframe. It estimates the cost for every phase of the project. This includes labour costs, material procurements costs, and operating costs.

Costs can change depending on circumstances such as delays and change requests and this information must be reported on in progress and status reports.

The project budget is used to keep track of the costs and control the costs of a project, but certain circumstances are bound to happen that will change things up and will require you to adjust the budget. You will need to report changes in the budget to the Green Leaf Café Manager. Once they approve, you need to update your budget and report changes in any project reports.

## Risk management

All project plans must include a risk management plan. Please refer to the *Green Leaf Café Risk Management Policy and Procedure* listed below.

## Record keeping

Record keeping applies throughout the life cycle of the project and at the end of the project. A file should be created. It refers to all documentation associated with the project including:

- Project scope
- Project management plan
- Project documents: Project documents include the documents created during project initiation, planning, implementation and closing phases of a project (for example, approvals and status/progress reports)
- Related projects: add project to *Existing Project log*
- Documents may include stakeholder register, meeting minutes, network diagrams, Gantt charts, risk register, SOWs, bid documents, issue log, lessons learnt register, change request logs, change request forms, status reports, progress reports, project final closure reports and many more.
- Project contracts and agreements including agreements with external customers and also with the suppliers of the project.

All these records should be stored in a designated file, with the project name as the naming convention.

Project Leaders must use the *Green Leaf Café Project Status Log* and update on a fortnightly basis. All internal stakeholders (team members) involved in a project must provide the Project Leader with an update on the status of their respective tasks on a fortnightly basis. This can be via email or during a teams or face to face meeting.

## Reporting

Reporting requirements will vary depending on the complexity of the project. Depending on the project and the sponsor, delegated authority or stakeholder requirements project managers are required to create, maintain and provide the Green Leaf Café Manager the following:

- Progress report: this is used to update stakeholders and detail how far the project has gone towards completion. Stakeholders reporting to the Project Manager must email and provide a brief update on their respective tasks on a fortnightly basis.
- Resource report: this report details who is doing what when and shows a breakdown of project members and tasks for the day
- Variance report: this report tells you whether the project is, in fact, progressing as planned, comparing the plan against the actual outcome and giving you a metric to measure if you are on track, ahead of schedule or running behind
- Final project report and financial records (reconciliation)
- Project Managers must use the *Green Leaf Café Project Status Log* and update the delegated authority on a fortnightly basis.

## Milestones

Milestones will depend on the objectives and deliverables identified in the Project Scope and Project Plan. You must report on your milestones and indicate if there are any risks or blockers to meeting the milestones and deliverables.

## Transitioning team members at end of project

It is the responsibility of the project manager to transition and reintegrate team members back into their normal roles at the conclusion of a project. This will require the project manager to:

- Communicate with team member and their manager throughout the project on timelines for returning to normal roles. This will include employees who have back-filled roles
- Debrief project team members at the end of the project to clarify the roles the team members will play when they return to their previous roles
- Conduct a thorough handover before each team member returns to their previous role.

## Processes

1. **Project scope:** Establish project parameters by completing the *Green Leaf Café Project Scope Template* for approval by delegating authority and/or the Green Leaf Café Manager. **Project Owner** must update *Existing Project log* at the beginning and end of the project.
2. **Project plan:** When approved to proceed with a more detailed plan, complete the *Green Leaf Café Project Plan Template* (this includes a risk management plan, budget and stakeholders)
3. **Monitoring project:** When approved, administer and monitor project (this includes detailing record keeping, communicating with team involved in project and monitoring plan). Project

Managers must use the *Green Leaf Café Project Status Log* and update the delegated authority on a fortnightly basis

4. **Finalising project:** Finalise and review project by completing the *Green Leaf Café Project Review Template* [this includes finalising financial recordkeeping and signoffs and review of project outcomes and processes].

## Relevant legislation, regulations and guidelines

*Privacy Act 2009*

*All Work Health and Safety Act 2011 (QLD)*

For large or complex projects, the Green Leaf Café recommends that the project manager:

- Attends short training courses provided by the [Australian Institute of Project Management](#) which also provides services to validate an employee's capability to perform the role of a project professional and issue project management certification.
- Reviews the [ISO 21500:2012 Guidance on project management](#) which provides guidance for project management and can be used by any type of organisation, including public, private or community organizations, and for any type of project, irrespective of complexity, size or duration.

## Related policies and procedures

You may also be required to refer to and follow the following policies and procedures:

- *Green Leaf Café Recruitment Policy and Procedure*
- *Green Leaf Café Performance Management Policy and Procedure*
- *Green Leaf Café Training and Development Policy and Procedure*
- *Green Leaf Café Risk Management Policy and Procedure.*