



POLICY REGISTER

Project Management

Policy adopted:

Reviewed:

File Ref:

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1				N/A		D26.123159

DOCUMENT CONTROL

Issue.	Prepared/Revised by and Date	Action/Amendment Description	Approved By and Date
1.0	Raju Ranjit -April 2025	First Edition	Council Minute No.

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1. INTRODUCTION

This Policy establishes the framework, principles, and minimum standards for the management of projects undertaken by Balranald Shire Council. It ensures that projects are planned, approved, delivered, and closed in a consistent, transparent, and accountable manner that delivers value for ratepayers and aligns with Council's strategic objectives.

The Policy applies to all capital works, infrastructure renewal, grant-funded programs, service improvement initiatives, and other significant projects managed by or on behalf of the Council, regardless of funding source

2. OBJECTIVE

The purpose of this policy is to establish a corporate approach to initiating, planning, delivery and closing of Council projects.

The objectives of this policy are to ensure that:

- Projects are effectively managed within the limitations of Scope, Quality, Environment, Resources (Time and Budget) and Risk, and in accordance with legislative requirements
- Appropriate governance and controls are established
- Communication, quality environmental and risk management plans are developed and executed throughout a project's life, as appropriate
- Appropriate authorisation and acceptance are established throughout the life of a project
- Stakeholder communication is inclusive
- Post implementation reviews are conducted and actively used to improve the conduct of project delivery

To achieve these objectives, this Project Management Policy must be included in the initiation, planning, delivery and completion/handover of all Council projects.

3. SCOPE

This Policy applies to:

- All Council staff, contractors, and consultants involved in the planning, approval, delivery, or oversight of Council projects
- All capital works projects and grant-funded programs irrespective of value; Operational projects exceeding \$150,000 in total estimated cost or where Council resolution is required
- Any project identified by the Chief Executive Officer or Manager requesting formal project management disciplines

The Policy is supported by the Balranald Shire Council Project Management Framework (the Framework), which provides detailed procedures, templates, and guidelines.

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4. DEFINITIONS

Term	Definition
Project	A temporary, unique undertaking with a defined scope, timeline, budget, and deliverable(s) undertaken to achieve a specific outcome.
Project brief	The project brief contains a brief description of the objective and background/context for the overall project, and outlines the project management framework to be adopted for the initiation phase, including how to measure the success of the phase; deliverables, budget and resources; project activities and milestones; governance and reporting requirements; communication with stakeholders; risk and issues management; assumptions and constraints; related projects and interdependencies; guidelines/standards; levels of review; quality assurance and capturing lessons learned.
Project Sponsor	The project sponsor is an individual (often a manager or executive) with overall accountability for the project and acts as the link between the project, the stakeholders, and strategic level decision making groups.
Project Manager	The officer or consultant assigned responsibility for day-to-day planning, execution, monitoring, and reporting of a specific project.
Project Steering Committee	A governance body established for complex or high-value projects, comprising the Project Sponsor, relevant Managers, and where appropriate, external representatives.
Capital Works Project	Any project involving construction, upgrade, renewal, or acquisition of infrastructure assets such as roads, bridges, water and wastewater systems, aerodromes, public buildings, or parks.
Grant-Funded Project	Any project that receives external funding from State or Federal Government programs, subject to a funding agreement.
Business Case	A documented justification for a project, including need, options analysis, cost-benefit, risk, and recommended approach.
Project close out report	A report that reviews the performance of the completed project against the project plan and project objectives, noting any lessons learnt and recommendations for improvement.
Project governance	The framework of authority and accountability that defines and controls the outputs, outcomes and benefits from projects, programmes and portfolios. The mechanism whereby the Council exerts financial and technical control over the deployment of the work and the realisation of value.
Project management	Project management involves planning, control and co-ordination of a project from inception to completion, ensuring timeframes, budget, administrative obligations and quality are met.

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Change Control	The formal process for assessing, approving, and documenting changes to a project's approved scope, budget, or schedule.
Variation	An authorised change to an approved project parameter (scope, budget, or schedule).
WHS	Work Health and Safety as governed by the Work Health and Safety Act 2011 (NSW).
Lessons Learned	Documented insights from a completed or in-progress project that can improve future project delivery.
Gantt Chart	A Gantt chart is a visual bar chart used to plan and track a project's progress. It acts as a timeline that shows the list of tasks involved, their start and end dates, milestones, dependencies between tasks, and assignees.
High Value High Risk Report	A report that provides information on Council projects that are considered by the Chief Executive Officer or Council to be a high value/high risk project for the organisation.
Project stakeholder	Any individual that has a direct or indirect interest in a project is known as a project stakeholder. They usually affect or are affected by the project decisions being taken over the course of the project lifecycle. A stakeholder can be anyone from the project team, executives, sponsors, customers, or the end-users.

5. POLICY STATEMENT

Balranald Shire Council is committed to:

- Delivering projects that are aligned with the Community Strategic Plan, Delivery Program, and Operational Plan
- Making sound investment decisions based on transparent business cases, cost-benefit analysis, and risk assessment
- Managing projects within approved scope, schedule, budget, and quality parameters
- Engaging with community stakeholders and affected parties throughout the project lifecycle
- Complying with all legislative, grant acquittal, and reporting obligations
- Continuously improving project management capability across the organisation
- Maintaining accurate records of project decisions, variations, and outcomes

6. LEGISLATIVE AND POLICY CONTEXT

This Policy is consistent with and should be read in conjunction with:

- Local Government Act 1993 (NSW)
- Local Government (General) Regulation 2021 (NSW)
- AS ISO 20500:2016 Guidance on Project Management
- A Guide to the Project Management Body of Knowledge (PMBOK) 2021
- The IPWEA Project Management Toolkit – Tools and Techniques for Managing Local Government Projects (IPWEA: Institute of Public Works Engineering Australasia - NSW)

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Division), Address: 447 Kent St SYDNEY 2000, Phone:02 82673001, Email: admin@ipweansw.org

- Work Health and Safety Act 2011 (NSW)
- Environmental Planning and Assessment Act 1979 (NSW)
- Government Information (Public Access) Act 2009 (NSW) (GIPA)
- Balranald Shire Council Community Strategic Plan 2035
- Balranald Shire Council Delivery Program and Operational Plan
- Balranald Shire Council Long-Term Financial Plan
- Balranald Shire Council Asset Management Strategy and Plans
- Balranald Shire Council Procurement Policy
- Balranald Shire Council Risk Management Policy
- Relevant Grant Funding Agreements and Program Guidelines

7. PROJECT CATEGORIES AND GOVERNANCE THRESHOLDS

Projects shall be classified into tiers based on total estimated cost and strategic significance to determine the appropriate level of governance, approval, and reporting.

Category	Total Project Value	Governance Requirements
Tier 1 – Minor	Up to \$100,000	Manager approval; Monthly reporting to CEO; Post-project review recommended.
Tier 2 – Moderate	\$100,001 – \$250,000	CEO approval; Project Brief required; Fortnightly reporting; post-project review required.
Tier 3 – Major	\$250,001 or over	Council resolution required.

Regardless of value, any project that carries significant community, environmental, reputational, or financial risk may be elevated to a higher tier at the discretion of the Chief Executive Officer.

8. PROJECT LIFECYCLE

All Council projects shall follow a structured lifecycle comprising five phases. Each phase has defined entry and exit criteria, and progression between phases requires appropriate authorisation.

PROJECT LIFECYCLE OVERVIEW

Phase 1: Project identification, needs assessment, and Business Case/Project Brief preparation.

Phase 2: PLANNING Detailed project planning covering scope, schedule, budget, risk, procurement, and stakeholder engagement.

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Phase 3: EXECUTION Procurement, construction or service delivery, progress monitoring, and change management.

Phase 4: MONITORING Ongoing performance reporting, risk reviews, budget tracking, and issue management.

Phase 5: CLOSURE Practical completion, defects management, asset handover, financial acquittal, and lessons learned.

8.1. Phase 1 – Initiation

The Initiation phase establishes whether a project is viable, justified, and aligned with Council's strategic direction. Key activities include:

1. Identifying the need, problem, or opportunity to be addressed
2. Developing a Business Case (Tier 2/3) or Project Brief (Tier 1/2) that documents objectives, options considered, estimated costs and benefits, risks, and recommended approach
3. Identifying the Project Sponsor and proposed Project Manager
4. Confirming budget allocation or funding source
5. Obtaining the required level of approval to proceed to Planning

8.2. Phase 2 – Planning

Before execution commences, a Project Plan shall be prepared and approved. The Project Plan shall include, as appropriate to the project tier:

1. Detailed scope of works and deliverables
2. Work Breakdown Structure (WBS)
3. Project schedule with milestones and critical path
4. Budget with contingency provisions
5. Procurement strategy and probity requirements
6. Risk register and mitigation strategies
7. WHS Management Plan and safety-in-design considerations
8. Environmental and heritage management requirements
9. Community and stakeholder engagement plan
10. Communications and reporting plan
11. Resource and staffing plan
12. Change control and variation management procedures

8.3. Phase 3 – Execution

The Execution phase involves the delivery of project scope through procurement, construction, and other project activities. Responsibilities during this phase include:

1. Managing contractors and consultants in accordance with Council's Procurement Policy and relevant agreements
2. Maintaining the project schedule and taking corrective action where deviations occur
3. Managing project costs against the approved budget and contingency

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4. Implementing and monitoring WHS management requirements
5. Processing and approving progress claims in accordance with contract terms
6. Managing project risks and issues as they arise
7. Identifying and processing variations through the Change Control process

8.4. Phase 4 – Monitoring and Control

Monitoring and control activities run concurrently with execution throughout the project lifecycle. The Project Manager shall:

1. Prepare and distribute progress reports at intervals appropriate to the project tier
2. Maintain and update the project risk register
3. Track expenditure against the approved budget and forecast final cost
4. Escalate emerging issues or risks to the Project Sponsor in a timely manner
5. Ensure all project changes are processed through the Change Control procedure
6. Maintain a complete project record in Council's document management system

8.5. Phase 5 – Project Closure

All projects shall be formally closed. Closure activities shall include:

1. Confirming practical completion and managing any defects liability period
2. Updating Council's asset register with completed asset data (condition, value, location)
3. Finalising all contracts, payments, and retentions
4. Completing grant acquittal reports and documentation as required by the funding agreement
5. Archiving all project records in accordance with Council's Records Management Policy
6. Preparing and distributing a Project Closure Report
7. Conducting a Lessons Learned review and recording outcomes for future improvement

9. PROJECT MANAGEMENT FRAMEWORK

Council projects are to be managed in accordance with this policy and best practice methodology through the four phases of the project lifecycle.

This policy has been prepared in accordance with the following:

- ISO 21500, an international standard that provides guidelines for project management
 - the standard was developed to help organizations plan, implement and complete projects effectively and efficiently
- IPWEA Project Management Toolkit – Tools and Techniques for Managing Local Government Projects
 - this toolkit provides numerous templates as may be required to assist throughout the four phases of a project
- A Guide to the Project Management Body of Knowledge (PMBOK) 2021

All projects must be planned, monitored and tracked, and saved to required Council systems. Council currently utilises software including the Pulse Project Management Module to facilitate electronic entry and reporting of the four phases of a project. Additionally, Excel is utilised as required for project planning and monitoring. Software requirements may change over time to meet Council requirements.

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A Business Case is required for larger projects, or where the project is considered by the Chief Executive Officer or Council to be a high risk to the Council, or when required by the funding body, and for all projects with a value greater than \$ 250,000 if not already endorsed by Council for inclusion in the Delivery Program/Operational Plan.

Approval of the Business Case is required by the relevant Manager, the Executive Leadership Team, and/or Chief Executive Officer. Once approved, the project can be submitted for consideration by Council for inclusion into the Delivery Program and Operational Plans.

All projects must have:

- required approvals
- a nominated Project Manager and an identified Project Governance Body (as appropriate).
- a project plan - a formal document that consists of approved cost, schedule, risk assessment, resources and project scope
 - The project plan guides the execution of a project from initiation to project closure and lays the foundation for all kinds of communication among the stakeholders, where applicable, project plans should include:
 - a stakeholder engagement and communications section that addresses consultation,
 - media releases,
 - social media,
 - website updates (for major projects)
 - any funding requirements for notifications and opening ceremonies as may be required
- Gantt charts (or similar) prepared as part of the programming and monitoring of the project – a visual plan to track a project's progress with a timeline that shows the list of tasks involved, their start and end dates, milestones, dependencies between tasks, and assignees.
 - A Gantt Chart can be prepared in Excel or using specialist software as appropriately (Appendix 2a and 2b)
- Regular reporting on the project plan, including any proposed variances, to be prepared by the project manager to the Project Governance Body (refer 6.6 below and Appendix 1)

10. PROJECT APPROVALS

Only projects approved by Council and included in Council endorsed Delivery Program and Operational Plans are permitted to proceed. Any proposed projects outside of the Delivery Program or Operational Plan will require specific approval from the Chief Executive Officer or Council depending on the scale of the proposed project.

Private Works can be approved by the relevant Manager/ Chief Executive Officer depending on cost, in accordance with Council procedures.

All projects with a value greater than \$250,000 must have a project plan approved by the relevant Manager and/or the Executive Leadership Team. This project plan must be approved before the project can commence.

There may be other approvals required by other agencies such as Transport for NSW and relevant funding bodies, or Council procedures, depending on the nature of the project.

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11. REPORTING AND MONITORING

Project monitoring is required throughout the project and particularly during the delivery phase, with reference to the project plan and in accordance with funding body requirements.

Regular reporting on project progress is required at least quarterly, or more frequently as may be determined.

A Project Governance Body is to be identified for any specific project.

A Project Report is to be submitted to Council monthly or as required by the Project Governance Body or Council, but at least quarterly - for monitoring large projects, or projects determined as high risk and/or high public interest.

A sample project reporting format is included at Appendix 1.

12. HANDOVER/COMPLETION

The handover process to the Project Owner/Service Owner must be carried out as detailed in the project plan before the project can be closed out.

A project close-out report is required for all projects with a value greater than \$100,000 within three (3) months of the project completion

13. ROLES AND RESPONSIBILITIES

Role	Responsibilities
Council (Elected Body)	Approves projects requiring Council resolution (Tier 3 and 4); Approves budgets in the Delivery Program and annual Operational Plan; Receives progress reports on major and complex projects; Approves significant variations in scope or budget that exceed delegated authority.
Chief Executive Officer	Provides executive oversight of the project portfolio; Approves Tier 3 projects within delegated authority; Ensures Council is informed of project performance; Approves overall project management policy and framework.
Manager of Technical & Project Services	Maintains responsibility for capital works and infrastructure project portfolio; Approves Tier 2 projects within delegated authority; Ensures Project Managers comply with this Policy; Reviews and endorses Business Cases and Project Briefs before submission for approval; Reports monthly on project portfolio performance.

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Role	Responsibilities
Project Sponsor	Responsible for project funding and ensuring the project achieves its objectives and benefits.
Project Owner/Service Owner	Responsible for realisation of project outcomes, ongoing asset management implications and any identified benefits.
Project Manager	Plans, coordinates, and delivers the project to approved scope, schedule, budget, and quality; Prepares project documentation, progress reports, and the Project Closure Report; Manages contractors, consultants, and project team members; Monitors and manages risks, issues, and changes; Maintains project records; Escalates issues promptly.
Project Steering Committee (where established)	Provides strategic guidance and oversight; Reviews project performance against objectives; Makes decisions on major risks, issues, or variations; Supports the Project Sponsor in stakeholder engagement; Meets at defined intervals as specified in the Project Plan.
Finance Manager	Provides financial management guidance and oversight; Reviews project budgets and expenditure reports; Ensures correct accounting treatment of capital versus operational expenditure; Supports grant acquittal and financial reporting requirements.
All Council Staff	Cooperate with project activities and requirements; Report project issues and risks to the Project Manager; Comply with this Policy and supporting procedures.

14. BUDGET AND FINANCIAL MANAGEMENT

Sound financial management is essential to achieving value for money and accountability to ratepayers. The following requirements apply to all Council projects:

14.1. Budget Establishment

All projects must have an approved budget before expenditure is committed:

1. Project budgets shall include an appropriate contingency allowance, which shall be no less than 10% for Tier 1 and 2 projects and 5–15% (risk-adjusted) for Tier 3 and 4 projects
2. Budget allocations shall be included in the Delivery Program and annual Operational Plan, or approved by Council resolution for projects not already included
3. Grant-funded projects must clearly identify the funding contribution, any required Council co-contribution, and GST treatment

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14.2. Expenditure Control

1. Expenditure must be committed within delegated financial authority limits
2. Project Managers shall maintain a running cost report tracking commitments and actuals against approved budget
3. Contingency may only be drawn down with the approval of the Project Sponsor (Tier 1/2) or Manager (Tier 2/3)
4. Budget overruns exceeding the contingency must be reported to the Manager and, where applicable, to Council

14.3. Variations and Change Control

1. All changes to approved project scope, budget, or schedule shall be assessed through the formal Change Control process
2. The Project Manager shall document the proposed change, impact assessment, and recommended action on a Project Variation Form
3. Approval of variations shall follow the delegation thresholds prescribed in Council's Delegations Register
4. Where a variation results in total project cost exceeding approved budget by more than 10% or \$50,000 (whichever is greater), the matter shall be reported to Council

15. PROCUREMENT

Project procurement shall comply with Council's Procurement Policy and applicable legislation. Key requirements include:

1. A procurement strategy appropriate to the project value, complexity, and risk shall be documented in the Project Plan
2. All procurement shall be conducted with probity, transparency, and value for money as guiding principles
3. Where grant funding is involved, procurement shall also comply with the conditions of the relevant funding agreement
4. Contract management responsibilities shall be clearly assigned and documented
5. Council shall maintain records of all procurement decisions, evaluation processes, and contract awards

16. RISK MANAGEMENT

Risk management is integral to effective project delivery. The following requirements apply:

1. A Risk Register shall be established at project initiation and maintained throughout the project lifecycle
2. Risks shall be assessed using the consequence and likelihood criteria in Council's Risk Management Framework
3. Risk treatment strategies shall be developed for all high and extreme risks
4. The Risk Register shall be reviewed at every progress reporting interval and updated as new risks are identified
5. Significant risks (rated High or Extreme) shall be reported to the Project Sponsor
6. Where a risk event occurs, the Project Manager shall implement the agreed treatment strategy and document outcomes

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17. WORK HEALTH AND SAFETY

Balranald Shire Council is committed to the health and safety of all persons involved in or affected by Council projects. Project Managers and contractors shall:

1. Comply with all requirements of the Work Health and Safety Act 2011 (NSW) and applicable WHS Regulations
2. Ensure safety-in-design principles are applied to capital works projects from the earliest stages of planning
3. Develop and implement a WHS Management Plan for all Tier 2, 3, and 4 projects prior to commencement of construction
4. Conduct project-specific inductions for all workers on Council project sites
5. Report all workplace incidents, near misses, and safety observations in accordance with Council's incident reporting procedure
6. Ensure Principal Contractor obligations are clearly assigned in construction contracts

18. COMMUNITY AND STAKEHOLDER ENGAGEMENT

Council recognises the importance of engaging the community and key stakeholders in project planning and delivery. Project Managers shall:

1. Identify all project stakeholders at the Initiation phase, including community members, businesses, government agencies, and utility providers
2. Develop a Stakeholder Engagement Plan proportionate to the project's complexity and community impact
3. Engage stakeholders at key project milestones as required by the engagement plan
4. Maintain a record of all stakeholder communications and feedback
5. Ensure community notifications are issued in advance of works that will affect residents or road users, including disruptions to traffic, utilities, or access

19. REPORTING

Transparent and timely reporting is fundamental to good project governance. Reporting requirements by tier are as follows:

Project Tier	Reporting Frequency	Reporting Requirements
Tier 1 – Minor	Monthly	Brief status report to Manager (schedule, budget, key issues)
Tier 2 – Moderate	Fortnightly	Project Status Report to Manager including progress, budget, risks, and issues
Tier 3 – Major	Monthly	Full Project Status Report to Steering Committee; Quarterly report to Council; Manager's monthly operational update

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20. GRANT-FUNDED PROJECTS

Given Balranald Shire Council's reliance on grant funding from programs such as the Local Roads and Community Infrastructure (LRCI) Program, Fixing Local Roads, Roads to Recovery, Regional and Local Infrastructure Program, and others, the following additional requirements apply to grant-funded projects:

- A copy of the executed funding agreement shall be held on file before project expenditure is committed
- All grant conditions, including eligible expenditure, milestones, reporting obligations, and acquittal requirements, shall be recorded in the Project Plan
- Expenditure records shall be maintained to enable accurate and timely grant acquittal
- Progress and acquittal reports shall be submitted to the funding body within the required timeframes
- Any proposed change that may affect grant eligibility must be referred to the Manager and the funding body before implementation
- On project completion, a grant acquittal report shall be prepared and submitted in accordance with the funding agreement

21. ASSET MANAGEMENT AND HANDOVER

Council is responsible for the long-term stewardship of community assets. The following requirements apply to projects that create or renew infrastructure assets:

1. Asset data (location, type, dimensions, condition, estimated useful life, replacement cost) shall be captured during construction and recorded in Council's asset management system upon project completion
2. As-constructed drawings and specifications shall be obtained from the contractor and archived
3. Asset handover shall be completed before the Project Closure Report is finalised
4. The depreciation treatment and asset capitalisation shall be confirmed with the Finance Manager
5. Any new maintenance obligations arising from the completed asset shall be identified and incorporated into the relevant asset management plan and future operational budgets

22. DOCUMENT AND RECORDS MANAGEMENT

All project documents shall be managed in accordance with Council's Records Management Policy and State Records Act 1998 (NSW) obligations. This includes:

- Establishing a project file in Council's Content Management (CM) at project initiation
- Storing all project documentation, correspondence, contracts, variations, approvals, minutes, and reports on the project file
- Retaining all project records for the minimum prescribed period
- Ensuring that documents classified as confidential are managed with appropriate access controls

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23. POLICY COMPLIANCE, MONITORING, AND REVIEW

23.1. Compliance

All Council officers are responsible for complying with this Policy. Non-compliance shall be managed through Council's performance management and, where necessary, disciplinary procedures. Systemic non-compliance shall be reported to the Chief Executive Officer.

23.2. Monitoring

The Manager Planning and Infrastructure shall monitor compliance with this Policy across the project portfolio and report on project portfolio performance to the Chief Executive Officer on a quarterly basis.

23.3. Review

This Policy shall be reviewed:

- No later than three (4) years from the date of adoption
- Following any significant change in relevant legislation or funding conditions
- Where significant project failures or audit findings indicate a need for revision
- Within 12 months of the appointment of a new Council
- As directed by the Chief Executive Officer or Council

24. RELATED DOCUMENTS AND TEMPLATES

The following documents support the implementation of this Policy and are maintained by the Manager of Technical & Project Services:

Document	Purpose
Project Management Framework	Detailed procedures, guidance, and tools supporting this Policy
Project Brief Template	For Tier 1 and Tier 2 project initiation
Business Case Template	For Tier 3
Project Plan Template	Comprehensive project planning document
Project Status Report Template	Standard progress reporting format
Risk Register Template	Identification and management of project risks
Project Variation Form	Change control and variation approval

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Document	Purpose
Stakeholder Engagement Plan Template	Planning stakeholder engagement activities
Project Closure Report Template	Formal closure and lessons learned documentation
WHS Project Management Plan Template	WHS obligations for construction projects
Grant Acquittal Checklist	Ensuring compliance with funding agreement reporting
Procurement Policy	
Risk Management Policy	
Asset Management Policy	
Code of conduct	
Gifts, Benefits and Bribes Policy	
Related Parties Disclosure Policy	

25. RIGHT TO VARY/TERMINATE

Council reserves the right to vary or terminate this policy at any time.

APPROVAL AND ADOPTION

This Policy was adopted by Balranald Shire Council at its Ordinary Meeting on [Date of Adoption].

Chief Executive Officer : _____ Date: _____

Mayor: _____ Date: _____

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APPENDIX 1 – PROJECT PERFORMANCE REPORT

PROJECT PERFORMANCE REPORT

Distribution List

Record the details of all project stakeholders accessing this document.

Name	Position	Signature	Date

Version Control

Record all approved changes to this document.

Revision #	Change Description	Approval Date	Author

Project Name

Record the project name in a way that clearly communicates what it is about.

Project

Record a unique identifier for the project that enables appropriate referencing.

Sponsor/Client

Record the name and contact details of the project sponsor/client.

Project Manager

Record the name and contact details of the project manager.

Progress

Record relevant and concise information from the project's commencement through to the reporting date, including reference to any of the following (add your own), if required:

- deliverables achieved
- issues resolved
- milestones reached

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- risks managed
- stakeholder involvement
- team performance

Summary Dashboard

Schedule <input type="checkbox"/> Behind <input type="checkbox"/> On <input type="checkbox"/> Ahead		Budget <input type="checkbox"/> Under <input type="checkbox"/> On <input type="checkbox"/> Over	
Planned work		Planned \$	
Actual work		Actual \$	
% work complete		\$ Budget spent	
Remaining work		Remaining \$	

Record in the dashboard the relevant information to enable accurate reporting of actual performance against both planned work complete (schedule) and planned costs incurred (budget).

Status

Record relevant and concise information as at the reporting date identifying both the schedule and budget baseline data measured against actual performance and budget to-date. Justify any variations between planned and actual results and the corrective actions (if required). Include a graphical baseline project schedule including time-phased budgeting for comparison purposes.

Completion

Record all work outstanding and budget requirements for completion. Reference should include potential risks, contingencies, proposed changes, approvals and other escalating issues, potential delays and/or anticipated cost over-runs impacting successful completion — on time, on budget and as specified.

Authorisation/Sign off

Record the name, signature and date of all appropriate stakeholders signing this performance report.

Updates

Record confirmation the following documents have been amended in line with the performance report.

- Project Scope
- Project Plan
- Project Risk Register

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Version	Adopted	Resolution	Commencement date	Last Review Date	Next Review date	Content Management Ref
1				N/A		D26.123159

- Project Change Request
- Contract (if variation required)

Appendices

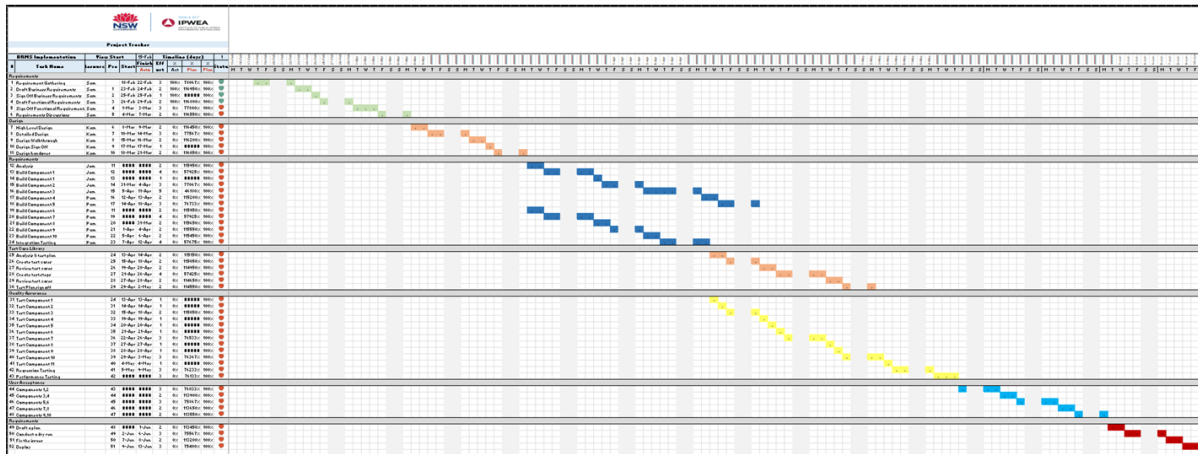
Record the details of any other information and/or documentation supporting the performance report.

Source: IPWEA Toolkit

DRAFT

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APPENDIX 2B: SAMPLE PROJECT TRACKER EXCEL GANTT CHART



1b-Project Tracker
Excel with Gantt Chart

Source: IPWEA Toolkit

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