

Liverpool Hope University

Project Governance Templates Handbook

This handbook explains how to use the standard project governance templates. It links each template to the project lifecycle stages and clarifies when and how staff should complete them. Using these templates ensures consistent governance, transparency, and compliance with University processes.

1. Introduction

The templates support delivery of projects within the University's Integrated Project Governance Framework. They are designed to:

- Provide clarity on project requirements.
- Ensure proportionality and reduce duplication.
- Create a clear audit trail for decision-making.
- Support staff to deliver projects consistently and effectively.

2. Templates and the Project Lifecycle

Each lifecycle stage is supported by specific templates:

Propose Stage

Template: Project Proposal

Purpose: To establish the business rationale, scope, and strategic alignment of the project.

Responsibility: Completed by the Proposer/Project Manager, signed by the Sponsor.

Output: Enables UPGG (and EPG/DIDG/Academic Committee) for capital projects) to decide whether to progress.

Template: Risk and Strategic Impact Scorecard

Purpose: To establish the level of governance and reporting required for a project.

Responsibility: Completed by the Proposer/Project Manager, signed by the Sponsor.

Output: Enables UPGG (and EPG/DIDG/Academic Committee) for capital projects) to decide whether to progress.

Define Stage

Template: Project Definition

Purpose: To define objectives, deliverables, governance, and success criteria in detail.

Responsibility: Project Manager drafts with stakeholder input; Sponsor approves.

Output: A definitive reference document; changes require formal change control.

Mobilise Stage

Template: Business Case

Purpose: To justify funding and resource allocation.

Responsibility: Prepared by Project Manager, reviewed by stakeholders, approved by

Sponsor and UPGG.

Output: Authorisation to proceed, with escalation to UEB/Council for major projects.

Plan Stage

Template: Project Plan

Purpose: To provide a detailed schedule, resourcing, RAID log, and benefits plan.

Responsibility: Project Manager with input from Workstream Managers.

Output: Baseline for delivery, approved by Sponsor and UPGG.

Deliver Stage

Template: Project Status Report (RAG)

Purpose: To provide regular updates to stakeholders and governance groups.

Responsibility: Project Manager prepares; Sponsor reviews; UPGG monitors.

Output: Ensures visibility of progress, risks, and budget performance.

Change Control

Template: Change Request

Purpose: To document and approve changes to scope, cost, schedule, or benefits.

Responsibility: Project Manager raises; Sponsor and UPGG approve.

Output: Transparent and auditable change decisions.

Close Stage

Template: Project Closure Report

Purpose: To confirm delivery, assess benefits, and capture lessons learned.

Responsibility: Project Manager drafts; Sponsor approves; UPGG records closure.

Output: Formal closure, budget reconciliation, and lessons for future projects.

3. Supporting Logs

Two Excel templates support ongoing project management and benefits tracking:

- RAID Log: Tracks Risks, Assumptions, Issues, and Dependencies. Maintained throughout the project by the Project Manager.
- Benefits Log: Defines benefits, KPIs, baselines, and targets. Tracks realisation during and after project delivery.

4. Guidance for Staff

When using these templates:

- Always complete the required sections; leave no critical field blank.
- Scale the level of detail to the project size (small projects require less detail).
- Engage stakeholders early to validate content.
- Ensure approvals are documented and saved.
- Upload final versions to the project SharePoint site.
- Use lessons learned logs to improve future projects.