[Insert organisation name/logo]

PROGRAM MANAGEMENT POLICY

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***🖌Note\****

*This policy template has been developed to meet the needs of a diverse range of services and includes items for consideration in policy and procedure.*

***Not all content will be relevant to your service.******Organisations are encouraged to edit, add and delete content to ensure relevancy.***

*All notes (like this one) should be considered and deleted before finalising the policy, and the contents list should be updated as changes are made and when content is finalised. See the NADA Policy Toolkit User Guide for more editing tips.*

*\*Please delete note before finalising this policy.*

***🖌Note\****

*To update the contents list when all content has been finalised, right click on the contents list and select ‘update field’, an option box will appear, select ‘Update entire table’ and ‘Ok’.*

*To use the contents list to skip to relevant text, use Ctlr and click to select the relevant page number.*

*\*Please delete note before finalising this policy.*

CONTENT

PROGRAM MANAGEMENT POLICY 1

SECTION 1: PROGRAM MANAGEMENT FRAMEWORK 4

1.1 Policy statement 4

1.2 Purpose and scope 4

1.3 Definitions 4

1.4 Principles 5

1.5 Outcomes 5

1.6 Delegations 5

1.7 Policy implementation 6

1.8 Risk management 7

SECTION 2: PROGRAM DEVELOPMENT 8

2.1 Rationale 8

2.2 Methodology 8

2.3 Program co-ordination 10

SECTION 3: PROJECT MANAGEMENT 11

3.1 Scoping and consultation 11

3.2 Project planning and design 12

3.3 Project implementation 13

3.4 Project evaluation 14

3.5 Record-keeping and reports 14

SECTION 4: EVENT MANAGEMENT 15

4.1 Events as projects 15

4.2 Event planning 15

4.3 Event co-ordination 16

4.4 Event finances 19

4.5 Event promotion and dissemination 20

4.6 Registrations 20

4.7 Event day preparation 21

4.8 Evaluation 21

4.9 Record-keeping 21

SECTION 5: PROGRAM EVALUATION 23

5.1 Types of evaluation 23

5.2 Purpose of evaluation 24

5.3 Planning an evaluation 24

5.4 Conducting an evaluation 24

5.5 Analysis of information collected 25

5.6 Evaluation report 25

SECTION 6: INTERNAL REFERENCES 27

6.1 Supporting documents 27

6.2 Related policies 27

SECTION 7: EXTERNAL REFERENCES 28

7.1 Resources 28

7.2 Websites 28

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# SECTION 1: PROGRAM MANAGEMENT FRAMEWORK

## 1.1 Policy statement

**[Insert organisation name]** is committed to effective program management through clearly defined processes which set clear goals, objectives and outcomes and allows for evaluation and the measurement of the impact of activities. This includes both clinical and non-clinical programs, projects and event management.

Programs, projects and events/activities are essential components of organisational work that contribute to ongoing service development and support to clients.

## 1.2 Purpose and scope

The purpose of this policy is to ensure program management at **[insert organisation name]** is guided by sound and consistent administration and management through its processes and practices.

This policy provides broad guidelines on planning, managing and evaluating organisational activities. The management of some activities may additionally be guided by specific funding and performance agreements.

This policy does not include guidance on communications or client clinical management. For further information, refer to the Communications Policy and the Client Clinical Management Policy.

## 1.3 Definitions

|  |  |
| --- | --- |
| **Communication plan** | A plan for the communication activities of a project, implemented during particular phases of that project. |
| **Evaluation** | Systematic assessment of process and/or outcomes against a set of explicit or implicit standards. |
| **Events** | May include large meetings such as the Annual General Meeting, networking, training, consultation and development activities for clients, employees or others. |
| **Events co-ordinator** | Oversees the management and organisation of an event. Event co-ordination may be part of a job description or an additional function of any employee demonstrating relevant capacity and interest. |
| **Program** | Any group of resources and activities, and their related direct outputs, undertaken to meet a given objective or set of related objectives. Distinguished from a project, which has a specific objective, activity, beginning and end, a program may include various projects at various times. This includes clinical programs such as **[insert e.g. the organisation Day Program]**. |
| **Project** | Activity or series of activities that has a beginning and an end. A project is required to produce defined outputs and realise specific outcomes in support of an organisational objective, within a clear schedule and resource plan. A project is undertaken within a specific timeframe, cost and performance parameters. |
| **Project management** | The systematic planning, organising and control of allocated resources to accomplish identified project objectives and outcomes. Project management is normally reserved for focused, non-repetitive, time-limited activities with some degree of risk, and for activities beyond the usual scope of program (operational) activities. |
| **Project manager** | The term is used in this policy to refer to the person responsible for managing the project or activity. This may be a supervisor, program manager, project officer or team leader. |

## 1.4 Principles

* Program management activities, goals and outcomes align with the organisation’s strategic and operational plans, including performance measures and budget.
* Research, consultation and collaboration with clients and other stakeholders are integral to the development and implementation of programs, projects and events.
* Program management activities and outcomes are communicated with staff, Board members and other relevant stakeholders.
* **[Insert organisation name]** respects differing perspectives and priorities held by individuals, groups and organisations in the implementation of programs, projects and events.

## 1.5 Outcomes

* All program activities, including projects and events, will have a detailed project plan in place that will guide the management of the project activity.
* Risks are effectively managed through detailed planning, consultation, monitoring and evaluation of program activities.
* Program management activities contribute to the development of knowledge, skills and service delivery for staff members.
* All program activities are evaluated, with information collected to inform and improve future activities and events.

## 1.6 Delegations

|  |  |
| --- | --- |
| **Board of directors** | * Endorse and ensure compliance with the Program Management Policy. * Participate in program, project or event activities when relevant. * Review and endorse financial expenditure for program activities. * Be aware of all current organisational programs, projects and events. * Support new and existing program management systems. * Provide expert advice, where appropriate. |
| **Business services/ management** | * Ensure compliance with the Program Management Policy. * Ensure that adequate insurance cover is provided for all program activities. * Provide support and advice as relevant to staff.   **CEO/Manager**   * Identify and lead funding, contractual and partner relationships related to program activities as relevant. * Communicate with the Board regarding key program activities. * Sign off (with Board signatory) on all external funding and performance agreements.   **Management**   * Lead project development, implementation and evaluation. * Facilitate project communication across the program management teams. * Ensure management of events is in line with the organisation’s strategic direction and program deliverables. * Guides and/or supports the development of organisational programs, projects and events. * Represent and participate at events as required. * Identify and lead program management activities in line with the organisation’s strategic and operational plans, and in line with related funding agreements. * Develop partnerships and alliances that support **[insert organisation name]** in its program activities. |
| **Program services/clinical** | * Compliance with the Program Management Policy. * Identify and lead program activities in line with the organisation’s strategic and operational plans, and in line with related funding agreements. * Develop or contribute to partnerships and alliances that support the organisation in its program activities. * Lead or support project development, implementation and evaluation, including planning, budgeting, monitoring, risk analysis and regular reporting. * Facilitate or contribute to project communication across program activities. |

## 1.7 Policy implementation

This policy is developed in consultation with **[insert organisation name]** staff members and approved by the organisation’s Board of Directors.

All staff members, students, volunteers and Board members are responsible for understanding and adhering to this Policy.

Specific monitoring and support activities undertaken include:

* Program and project activities are a standing agenda item in staff meetings.
* This policy is part of relevant staff orientation processes.
* This policy is referenced in relevant policies and other supporting documents to ensure that it is familiar to all relevant staff and is actively used.
* This policy will be reviewed in line with the quality improvement program and/or relevant legislative changes.

**🖌Note\***

Quality improvement programs provide opportunities to identify and review your service practices. If your organisation doesn’t have a quality improvement program it is recommended that one is developed to ensure better outcomes for your organisation. For more information about quality improvement refer to the Organisational Development Policy of the NADA Policy Toolkit.

\*Please delete note before finalising this policy

* Program/projects/events evaluation analysis.
* Project plan control measures.
* **[insert other monitoring activity].**

This policy is implemented in conjunction with the Communications Policy, Organisation Development Policy, Risk Management Policy, Client Clinical Management Policy and the Information and Communication Technology Policy.

## 1.8 Risk management

Mechanisms are in place to ensure that program management systems are effective and regularly monitored.

Other risk management actions include:

* Risk management considerations are embedded into program/project/event planning.
* Program, project and event plans are appropriately monitored and controlled by the allocated staff member.
* **[Insert organisation name]** ensures that programs, projects and events have a sound theoretical base, are ethical and promote evidence-informed practice.
* Staff are provided with ongoing support to assist them to develop, implement and evaluate programs, projects and/or events effectively.
* The need for improvements in organisational program, projects or events can be identified by any Board, management, staff member or client, either through feedback or by the application of quality monitoring systems.

For further information on how to assess and treat risk, refer to the Risk Management Policy.

# SECTION 2: PROGRAM DEVELOPMENT

**[Insert organisation name]** integrates a range of programs, projects and activities aimed at improving practice, service delivery, management and governance. There is also a strong focus on evidence-informed practice to inform the development of these programs, projects and activities, ensuring the organisation acts in accordance with the drug and alcohol sector practices and innovations.

The purpose of this section is to ensure program development at **[insert organisation name]** is guided by sound and consistent data, research, evidence and practice models.

This section provides guidance to staff members, volunteers, students and Board members that are related to program development.

At **[insert organisation name],** programs, projects and related activities are:

* Aligned with the organisation’s values and strategic direction
* Informed by evidence-informed practice, research, together with consultation and collaboration with clients and other stakeholders is an integral part to the development and implementation of successful programs.

This section makes sure that all programs:

* Have clear and supportive practice models in place
* Are effectively managed through detailed planning, consultation, monitoring and evaluation
* Are based on client needs.

## 2.1 Rationale

In order to develop successful programs, projects and activities, **[insert organisation name]** applies research and evidence-informed practices as appropriate and, where relevant, to support areas of its operation and program development. By doing this, the organisation ensures that:

* Programs, projects and activities are critically evaluated and guided by current research and evidence-informed practices.
* All relevant stakeholders and experts are engaged and consulted to guide quality programs, projects and activities.
* Its performance with similar organisations can be compared through benchmarking and other processes.

For more information regarding program development rationale, research and evidence-informed practice refer to the Research and Evidence-informed Practice section of the Organisational Development Policy.

## 2.2 Methodology

**[Insert organisation name]** develops programs, projects and activities by merging three main areas of its operations into a cycle as shown following:

### 2.2.1 Client priority areas

As a client-focused organisation, all programs, projects and activities of **[insert organisation name]** are informed by the needs of clients. Where appropriate and necessary, the organisation establishes advisory or reference groups to identify priority areas, inform the development of, and oversee, program activity. These groups reflect the diversity and experience of client groups, as well as relevant external stakeholders. Client involvement is considered when appropriate and when it can be supported.

Client needs, feedback and consultation are instrumental to inform programs, project and other activities of the organisation. The organisation consults with clients and other stakeholders in many levels of decision-making to inform work practices. The following methods are used to consult with clients:

* Questionnaires and surveys
* Forums and workshops
* Telephone contact and email
* Face-to-face interviews/meetings
* Focus groups
* Advisory/Reference groups
* **[Insert other consultation activity]**.

For more information about client feedback processes, refer to the Program Evaluation section (Section 5) of this policy and the consumer participation section of the Organisation Development Policy.

### 2.2.2 Organisational strategies

Strategies are taken directly from the strategic plan outcomes. The goals and outcomes in the **[insert organisation name]** Strategic Plan provide directions for the organisation and its stakeholders as a service provider; they are linked to client priority areas and must guide program development.

### 2.2.3 Programs, projects, intervention models and other activities

Program development within **[insert organisation name]** is based on the organisation’s treatment and intervention approaches as outlined in the Client Clinical Management Policy. In addition, the evaluation of current programs, projects, intervention models and activities will contribute to improving current programs as well as identifying a need for new program areas or activities. Service audits and staff surveys can assist in identifying activities and project areas where staff or organisational enhancement is needed.

**[Insert organisation name]** will regularly consult with stafffor input on current program and service gaps through:

* Questionnaires and surveys, e.g. Training Needs Analysis (see the Training Needs Analysis Template)
* Service audits, e.g. Dual Diagnosis Capability in Addition Treatment (DDCAT) or a service communication audit (see the Service Communications Audit Template)
* Staff and team meetings
* Focus groups
* Advisory/Reference groups
* **[Insert other consultation activity]**.

## 2.3 Program co-ordination

Programs, projects and activities are implemented primarily by **[insert responsible teams]**, made up of **[insert positions involved; for example, program managers, project workers, team leaders].** The CEO/Manager also undertakes activities and leads broad strategies and direction for the organisation.

Program activities are reviewed on a regular basis through specific program/team meetings which are held regularly.

Specific program/team meetings identify areas of collaboration, opportunities for new activities, and ensure effective communication across the team. Meetings are attended by all members of the program team, and may also include the CEO/Manager and administration staff, when necessary. Program plans and other administrative tools are provided by the staff member leading the program/ project.

# SECTION 3: PROJECT MANAGEMENT

**[Insert organisation name]** is committed to effective project management through clearly defined processes, which set clear goals, objectives and outcomes and allows for evaluation and the measurement of the impact of activities.

The purpose of this section is to ensure project planning and management at **[insert organisation name]** is guided by sound and consistent administration.

This section provides guidance to staff, volunteers, students and Board members and encompasses but is not limited to:

* Project planning
* Project risk management
* Budget management
* Project submissions
* Evaluation.

At **[insert organisation name],** projects and related activities are:

* Aligned with the organisation’s values and strategic direction
* Informed by the collaborative interaction between client and other stakeholders
* Communicated among staff, Board Directors, clients and other relevant stakeholders.

The organisation establishes new projects to direct activities that are time-limited with a specific resource allocation, usually through an external funding body, or as an internal exercise.

3.1 Scoping and consultation

Projects are developed based on thorough scoping and consultation, through a variety of mechanisms. These include:

* Previous project final reports, evaluations and recommendations
* Client and stakeholder surveys
* Literature reviews (including both peer-reviewed and grey literature)
* Policy and guidelines.

Consultation continues to occur at all levels over the life of the project to ensure relevance, appropriateness and continuous improvement.

### 3.1.1 Project Submissions

The CEO/Manager and relevant staff members are responsible for identifying funding opportunities and developing draft funding submissions. Funding submissions do not require the approval of the Board of Directors if they are clearly within the scope of **[insert organisation name]**’s strategic direction.

Where the CEO/Manager deems the submission is outside of the organisation’s strategic direction and would amount to significant new business, the Board of Directors will be approached for their approval in principle to proceed.

See the **[Insert organisation name]** Project Plan Template which can be adapted for use as a project submission.

3.2 Project planning and design

Prior to the development of a project plan, the project manager is to consider the following areas, in order to develop that plan:

* + 1. Aim
    2. Objectives
    3. Scope
    4. Methods
    5. Project outputs and outcomes
    6. Risk management
    7. Reporting and communication
    8. Governance
    9. Resources and budget
    10. Evaluation and project conclusion.

Projects are to be developed using the Project Plan Template which serves as a guide to assist staff in implementing projects.

Note: Some details of the project plan may vary depending on specific requirements of the project funder, and alternative templates may be provided directly by the funding body.

The project manager prepares a draft project plan based on initial team discussions, considerations or findings from research undertaken, and, if necessary, will allow time for feedback to be provided by relevant staff and/or stakeholders.

All comments are to be assessed and acknowledged by the project manager. It may be appropriate to provide feedback to staff/stakeholders who have made comments on how the information they have provided has been considered in the revised/final project document.

Objectives set in the plan should be developed based on the SMART model, in that they should be:

1. Specific: specify what you want to achieve

2. Measurable: how will you know when you have achieved it?

3. Achievable: the measure relates to the strategy

4. Realistic: attainable and yet still pose a challenge

5. Time-orientated: a specific time period or deadline is set.

A number of project management questions are contained in the [**insert organisation’s name]** Project Planning Checklist which can be used as a tool to develop the project plan. The Strategic Plan should also be considered in the project design phase, particularly in relation to developing project objectives and outcomes.

### 3.2.1 Project co-ordination

There are three main considerations when co-ordinating a project:

* External relationships (who will be involved).
* Internal project management structure (who will co-ordinate the project internally or will be part of the team and the Advisory group).
* Roles and responsibilities of internal and external representatives.

### 3.2.2 Risk management

An important aspect of project management is to identify and assess potential risk factors. This may include a description of the risk, impact of the risk on the project, actions which can be taken to assist in reducing the risk, and a contingency plan. The project manager will seek the assistance of stakeholders to reduce risk pro-actively.

The project may be exposed to risks, such as working with external organisations that are beyond the control of the project manager. The development of partnership agreements, memorandum of understanding and other contractual relationships, as outlined in the Organisational Development Policy, are likely to minimise the risks to the organisation.

Risk can change as the project progresses. It is possible for a project or project activity to be initially assessed as low-risk and then escalate to a higher risk level. Any alteration of project risk factors will be identified by the project manager, and addressed.

The project advisory group can assist in reviewing and identifying risks. The Risk Management Policy provides more information on how to assess and treat risk.

### 3.2.3 Budget management

Project budgeting and expenditure is the responsibility of the project manager. In most cases, the project leader will prepare a budget in consultation with the CEO/Manager and/or other **[insert financial allocated staff member, for example finance officer]**.

The project manager, in collaboration with the **[insert allocated finance officer]**, is responsible for managing the acquittal of funds for their projects and arranging an audit as required by funding bodies. The Board of Directors and/or CEO/Manager is responsible for final approval of financial reports prior to their public declaration and/or submission to funding bodies.

## 3.3 Project implementation

When a project is ready to commence, the project manager will implement the project with the resources and information specified in the project plan. The project manager may choose to use additional implementation tools to monitor progress and activity such as a Gantt chart (see the Gantt chart template).

It is important that the project manager communicate clearly with all staff about the new project, including a brief overview of the project and information on where enquiries should be directed.

### 3.3.1 Additional project templates and tools

The Optional Project Templates document is provided as part of this policy and could support the development and management of organisational projects; these tools include:

* Project issues register
* Responsibilities matrix
* Stakeholder communication plan
* Project overview
* Project status report
* Contract and procurement plan
* Risk matrix and action plan
* Time management plan
* Budget management
* Project quality management plan
* End of project review tools.

## 3.4 Project evaluation

Evaluation is an integral part of planning projects, and evaluation activities are to be actively considered at the start of all new projects. Effective evaluation processes enable the organisation to demonstrate accountability, benefits of the project, identify good practice and collect information for future planning and improvements.

When planning an evaluation, staff are to:

* Consider project objectives and goals
* Identify performance measures that will demonstrate the intended outcomes of the project
* Develop evaluation questions
* Consider how the information will be collected (e.g. surveys, interviews, focus groups)
* Identify resources to undertake the evaluation (e.g. staff time, funding for a consultant).

For more information on evaluation processes, refer to Section 5 of this policy.

## 3.5 Record-keeping and reports

Finalised project reports are forwarded to all staff to ensure the organisation is informed of current activities. Electronic copies are to be stored in the **[insert drive name and function; for example: drive A/organisation projects/completed project]**.

Any current projects are to be stored in the **[insert drive name and function; for example: drive A/organisation projects/current project]**.

A hard copy of completed projects and supporting documents is kept in the organisation’s completed project folder located on the **[insert folder location].**

# SECTION 4: EVENT MANAGEMENT

**[Insert organisation name]** manages events according to priorities identified in its strategic plan and/or through specific project activity.

This section provides broad guidelines on planning, managing and evaluating events. The management of some events may additionally be guided by specific funding agreements.

In striving for best practice, **[insert organisation name]** event management:

* Planning processes take into account agreed goals and available resources
* Aims and activities align with the strategic plan
* Activities and outcomes are communicated clearly to all relevant parties.

This section ensures that all the organisation’s events are:

* Well organised and managed
* Appropriately evaluated and the information collected used to inform future activities and events.

## 4.1 Events as projects

**[Insert organisation name]** considers each event to be a project in its own right. This means when planning and managing an event, staff will consider many of the elements considered in broader project management. Refer to Section 3 of this policy.

## 4.2 Event planning

### 4.2.1 Event aims and objectives

The aims and objectives of events meet the needs of the **[insert organisation name]** clients, staff and/or stakeholders and work towards the organisation’s goal and objectives. The specific aims will be determined by the relevant event, the Strategic Plan and/or funding requirements.

### 4.2.2 Event scope

The scope of an event is determined by a number of factors, including target audience (past/current clients, carers, staff, stakeholders, or the community), resources and budget. Once an event scope has been identified, it should be documented in the project/event plan and clearly communicated to all stakeholders through event promotion.

### 4.2.3 Event methods

A wide variety of event types are offered to clients and staff to respond to their needs. The event type will be determined by the primary aim of the event and the target audience. Events may include:

* Open day
* Family fun day
* Cultural celebrations (e.g. NAIDOC Week activities)
* Training or workshops for staff or clients
* Networking event for staff and stakeholders
* Forum on issues relevant to clients, staff, the organisation or the broader sector
* Resource launch to promote a resource developed by the organisation
* Annual General Meeting
* **[Insert relevant event methods].**

## 4.3 Event co-ordination

Event responsibilities, including planning, implementation and evaluation are coordinated and led by the **[insert allocated position];** however, all staff and Board members may be required to support organisational events.

Successful event co-ordination, particularly for large events, can be supported by having a project or implementation plan noting activities to be carried out. The plan should incorporate key activities and identify who is responsible for each activity. Key activities to be carried out are highlighted in this policy and the organisational Event Planning Checklist. An event plan can be developed using the Project Plan template and should include risk management strategies to account for possible risks related to the event.

### Event co-ordinator

Individual staff members can be identified as the lead event co-ordinator to project-manage events. The identification of a co-ordinator is based on their role, skill, capacity and funding agreements (if applicable).

The identified event co-ordinator will work together with other relevant staff (e.g. Supervisor or Administration Officer) in planning and coordinating an event. The majority of events can be managed with one or two staff at the planning stages; additional staff may be required to assist in the run-up to, or on the day of, the event. All staff involved should be aware of their allocated individual roles and responsibilities.

### 4.3.2 Organising committee

An organising committee may be required when planning large **[insert organisation name]** events. Organising committees should include representation from the organisation, and depending on the nature of the event, client, and other stakeholder representation may be required. The committee will ideally be comprised of people with a range of skills, knowledge and experience in event management and in the theme of the event.

The committee has three main functions in the co-ordination of an event:

* Planning and advisory function: to assist in identifying, scoping and shaping the event. Committee members may offer suggestions on speakers, themes, resources, sponsorship and other event aspects.
* Executive function: to assist in overseeing the event management, including chairing the committee, writing minutes and budget management. The event co-ordinator is often the identified chairperson, and/or minute-taker, and budget management may be delegated within the committee, dependent on individual’s skills, knowledge or experience.
* Worker function: the committee will take on many event tasks (e.g. registrations, organising the welcome to country or event promotion) and will assist in identifying individual roles and responsibilities in the management and co-ordination of the event. Tasks may be allocated dependent upon skill, knowledge or experience. Staff outside of the organising committee may also be identified to take on specific tasks.

### 4.3.3 Event date and time

When selecting a date for an event, the staff member co-ordinating the event should consider:

* Project and funding agreement timelines
* Significant dates (e.g. school holidays, Aboriginal and Torres Strait Islander Communities’ schedules, other internal events and other major sector events)
* Target audience
* Legislative requirements (for AGM and other compliance requirements)
* Where possible, event running times should take into consideration peoples’ ability to attend activities (e.g. school times or regular work hours)
* **[Insert other factor].**

Event details should be confirmed well in advance of holding an event and as soon as possible after deciding to hold an event. Once the date, time and venue are selected, the next stages of event management can proceed.

### 4.3.4 Venue selection

When selecting an event venue, a range of factors are to be considered, including:

* Budget: a number of venues should be sourced for competitive pricing, where funding is limited and/or the event is small in size, internal rooms may be used. **[Insert details of community venues where an agreement exists]**.
* Insurance coverage in external and internal event venues.
* Facilities required and on offer, e.g. transport, disability access, child-friendly, restricted access to alcohol or gaming machines.
* Capacity: size of the venue, maximum number of attendees in the desired layout.
* AV equipment availability: consider if AV equipment is required and if it is inclusive or additional to the venue hire costs.
* Catering options.
* Past experience: **[insert organisation name]** will often use the same venue for a number of events over time. Past experience of the service and facilities provided should be considered prior to re-booking with previous providers.
* **[insert other factor].**

A folder containing information on recently used venues can be found on the **[insert folder and file name and location]**.

### 4.3.5 Entertainers, speakers and/or facilitators

Entertainment, speakers and/or facilitators may be required for **[insert organisation name]** events. They should be invited or contracted, based on their expertise and experience in the area of focus for the event.

Entertainers, speakers and/or facilitators should be clearly briefed and aware of their responsibilities at the event; this may include negotiating the following:

* arrival times
* performing or presentation time
* audiovisual equipment available
* accessibility and/or parking
* **[insert other].**

Where entertainers, speakers and/or facilitators are being paid, refer to the Partnerships and External Relationships Section of the Organisational Development Policy.

### 4.3.6 Acknowledgement of Country/Welcome to Country

**[Insert organisation name]** acknowledges the traditional owners of the land on which we work and as such **[Insert organisation name]** hosted events show respect for Aboriginal culture and heritage and the ongoing relationship the traditional Custodians have with the land, by ensuring the appropriate protocols are followed, depending on the nature of the event. These protocols include the provision that the first act of the day in all events is an Acknowledgment of Country or a Welcome to Country.

#### 4.3.6.1 Acknowledgement of Country

An Acknowledgement of Country can be formal or informal and involves visitors acknowledging the owners on the land where the event is held and their continuing connection to the land[[1]](#footnote-1). Visitors can be Aboriginal or non-Aboriginal.

An Acknowledgment of Country is offered at all small events (e.g. meetings). At larger events a Welcome to Country will be performed.

To check which land the event is being held on, contact the NSW Aboriginal Land Council or ANTaR NSW.

Each acknowledgement can be different; however, a guide for staff, including the details of the traditional owners on the land on which **[insert organisation name]** stands, is listed below.

*[Insert acknowledgement of country]*

**🖌Note\***

An example of an acknowledgement of country for the Sydney CBD and Redfern area is:

I would like to acknowledge the Gadigal people of the Eora Nation, the traditional custodians of the land and pay my respects to the Elders past, present and future.

To check which land the event your organisation sits on, contact NSW Aboriginal Lands Council or ANTaR NSW.

\*Please delete note before finalising this policy.

#### 4.3.6.2 Welcome to Country

A Welcome to Country is a ceremony performed by Aboriginal or Torres Strait Islander peoples to welcome visitors to their traditional land[[2]](#footnote-2). It may include a speech, traditional song, dance or music. All large events will invite a representative of the land on which the event is taking place to perform a welcome.

To arrange the Welcome to Country the event co-ordinator/or identified staff member should contact the relevant Local Aboriginal Lands Council. The NSW Aboriginal Lands Council can assist in identifying the relevant local council to liaise with. A fee is required for all Welcome to Country services.

Once an appropriate representative has been identified, the event co-ordinator can liaise directly with him/her and provide more detail on the event.

On the day of the event when a welcome has been offered, it is important to acknowledge that welcome. The staff or Board member to follow the welcome should do so by noting:

*Let me begin by acknowledging the Traditional Owners of this land and extending a warm and sincere thank you to* ***[them/insert name]*** *for welcoming us all to their country today. I would also like to pay my respects to the Elders past, present and future.*

### 4.3.7 Optional event management templates

A range of event management templates can be adapted for use at **[insert organisation name]** events. These include:

* Event running sheet template
* Event agenda template
* **[Insert template name].**

## 4.4 Event finances

**[Insert organisation name]** may receive specific funds or sponsorship to contribute towards the running of events and conferences. Where the funding is guided by a specific funding agreement, the project manager and/or event co-ordinator is responsible for meeting all deliverables set out in the agreement.

### 4.4.1 Budget

An adequate budget is to be identified for all **[insert organisation name]** events before other tasks are initiated. The budget should take into account expenses such as:

* Speaker and/or facilitator costs
* Resources, including venue hire, catering and AV equipment
* Human resources
* Promotion and advertising
* Contingency funds should also be identified, where possible, to cover unexpected costs.

### 4.4.2 Fees

The nature of the event, the target audience and funding available will determine if the event is free, accepts small donations or if a registration fee is required. Refer to the Financial Management Policy for further guidance on managing income.

### 4.4.3 Sponsorship

**[Insert organisation name]** welcomes sponsorship for its events from government agencies, non-government organisations, charitable foundations or private companies. Sponsorship is particularly useful in conducting events, as it helps to reduce costs for clients, staff or community participation.

**[Insert organisation name]** will acknowledge the contribution of its sponsors. This may involve:

* Including the sponsor’s logo on event materials
* Allowing the sponsor to set up a display at an event
* Acknowledging sponsorship in any opening and closing address; and/or
* Offering free registration to a sponsor’s representatives (if relevant).

**[Insert organisation name]** will not accept sponsorship or advertising from organisations or individuals that are engaged in business which is unlawful, unethical or damaging to public health and wellbeing; from political parties; or agree to any conditions of sponsorship, which may compromise the organisation’s independence, or compromise the purpose of the particular publication or event.

Any call for sponsorship must retain the following notice:

*Sponsors’ values must be in line with the goals and principals of* ***[insert organisation name]*** *and the non-government drug and alcohol sector.*

## 4.5 Event promotion and dissemination

### 4.5.1 Promotion methods

**[Insert organisation name]** events are to be promoted using a variety of communication strategies depending on the nature and scope of the event, including the organisation’s website, mailouts, internal emails, newsletters, email updates, other publication and websites, posters, newspapers and mailing lists when appropriate.

For more information regarding the distribution list, refer to the marketing and promotion section of the Communications Policy.

### 4.5.2 Post-event promotion

Following an event it is important to promote outcomes, outputs and other achievements to acknowledge the work of those involved in the organisation of the event. This may include contacting the participants with an event summary, evaluation report, information on how to access resources discussed, made available or produced as a result of the event. Uploading this information to the organisation’s website or via social media and promoting it via email will assist in reaching a wider audience beyond those who attended the event.

In addition, it may be of value to produce an article for the organisational newsletter or other relevant publications to highlight the activities and outcomes of the event.

Media releases may also be appropriate. Refer to organisation Communications Policy for guidance on media communications.

## 4.6 Registrations

### 4.6.1 Registration management

Registrations/RSVP may be required for some **[Insert organisation name]** events to confirm numbers and diversity of people in attendance. A central staff member will be responsible for collating all relevant information, including name, position title, and contact details, dietary and other requirements.

Depending on the nature of the event, an RSVP or registration form may also be required. Clear information should be provided on when and how RSVPs and/or registration forms should be received on all promotion materials.

On receipt of a registration/RSVP, a confirmation email should be sent, noting that the registration is confirmed and that a reminder will be sent a **[insert time; for example, a week]** before the event.

For events that include a fee, the confirmation email will also include an invoice/receipt (as relevant).

A reminder should be sent to all registered individuals **[insert time, for example a week]** before the event. Clear information about event times and directions to the venue, including transport, parking and accessibility should be provided and a request to notify **[Insert organisation name]** ASAP if they have decided not to attend the event.

## 4.7 Event day preparation

The **[insert allocated position, for example event co-ordinator],** ensures that on the event day:

* Work Health Safety Risk Assessment is conducted (when required – refer to the Work Health Safety Policy for more information).
* Staff supporting the event are properly briefed and have received a running sheet for the event.
* Organising team arrive to the venue with appropriate time to set up for the event before the speakers/entertainment and participants’ arrival.
* Event signage and **[insert organisation name]** branding should be visible to participants when entering the venue.
* Participants are advised of available facilities, such as bathrooms and refreshments, upon registration.
* A staff member should be available at the venue for the entirety of event.
* **[Insert other relevant activity on the event day].**

Participants will be advised by posters placed around the venue if they will be photographed or filmed at any organisational event. The posters will advise participants to notify a staff member, if they do not wish to be photographed.

## 4.8 Evaluation

**[Insert organisation name]** conducts evaluations of its events as a matter of good practice and continuous improvement. This is also frequently a requirement of funding agreements. As such, event evaluation should be considered as part of the planning process.

The evaluation process may vary according to the nature of the event, or the requirements of funding agreements.

Event feedback should be collated into a short report for distribution to the Board, funding bodies and other stakeholders (report format and distribution may vary according to event type and specific funding agreements). For more information about evaluation, refer to Section 5 of this policy.

## 4.9 Record-keeping

All events and related activities, including contracts, feedback forms, reports are to be documented in the organisation’s events folder located at **[insert folder location]** and managed by **[insert allocated position, for example event co-ordinator].**

Event documents are part of the post-event review and evaluation and aim to inform future organisational events; this may include considering the following:

* Venue accessibility, catering, support and cost
* Entertainers, speakers and/or facilitators’ respective suitability
* Event times
* Participants’ recommendations for improvement
* **[insert other relevant document or information].**

# SECTION 5: PROGRAM EVALUATION

Effective evaluation processes enable **[insert organisation name]** to demonstrate accountability, program benefits, identify good practice and to collect information for future planning and improvements. Evaluation methods also enable the organisation to record any unanticipated outcomes of the program or service. Program Evaluation is considered integral to the early planning stages of a program and consideration should be given to the outcomes identified and how they might be achieved.

This section establishes a consistent basis for program evaluation, enabling **[insert organisation name]** to effectively generate and use evaluative knowledge.

This policy does not describe evaluation of staff, policies, systems, or external relationships. However, one or more of these may be considered within a specific program evaluation.

To provide quality and co-ordinated programs, the organisation:

* Evaluates its programs, activities and services to ensure all aspects of service delivery are effective and guided by current evidence-based practice.
* Actively considers and identifies evaluation processes at the commencement of new programs and services.
* Uses methods which will respect confidentiality, be ethical, non-threatening and appropriate for different target audiences.
* Ensures evaluation processes are explicit and transparent and the results are shared with the project/program participants.
* Conducts evaluation systematically and rigorously, using appropriate methods of data collection, which address clearly defined processes, impacts and outcomes.
* Considers evaluation outcomes to inform future practice and planning.
* Ensures that evaluation processes address the key questions that are important to clients, the organisation and funding partners, including the conditions that contribute to effective results.

**[Insert organisation name]** is committed to the involvement of staff, clients and stakeholders in its evaluation activities.

## 5.1 Types of evaluation

There are many different ways to conduct an evaluation. It is important to ensure that the evaluation processes used suit the type of project/program, the resources available and the size of the initiative. Types of evaluations that can be used include:

* **Formative evaluation**: a set of activities designed to develop and pre-test project materials and methods with the aim of clarifying relevance and feasibility of the methodology[[3]](#footnote-3).
* **Process evaluation:** a set of activities directed towards assessing progress in project implementation and recording the extent to which the project was implemented as planned and the circumstances in which it could be reproduced[[4]](#footnote-4).
* **Summative evaluation:** considers different levels of evaluation, process and impact as well as economic evaluation and analyses data to establish overall effectiveness and value of the project[[5]](#footnote-5). This is often documented in a final report.

Evaluation can be a component of research and can build on evidence-based practice, refer to the Research and Evidence-based Practice section of the Organisational Development Policy.

## 5.2 Purpose of evaluation

Evaluation is conducted on **[insert organisation name]** programs and services for purposes such as:

* Determining if they have done what they set out to do
* Identifying what elements are working well and what are not, in order to modify where necessary
* Contributing an understanding to the sector
* **[insert other purpose].**

The key action points when evaluating a project or program are:

* Establishing a reference group
* Designing an evaluation plan/framework
* Deciding on the types of indicators to be used
* Deciding on the data collection methods
* Implementing evaluation activities
* Consolidating and analysing results
* Developing an evaluation report
* **[insert other key point].**

The findings of the evaluation will be used to make decisions about the future of the program and can contribute to future funding submissions. The Program Evaluation Checklist is a useful tool in identifying tasks to be considered when completing an evaluation.

## 5.3 Planning an evaluation

Evaluation is an integral part of planning programs, services and projects and an evaluation will be actively considered at the start of all new programs. When planning an evaluation, staff need to consider the following:

* Program objectives and goals
* Identify performance measures that will demonstrate the intended outcomes of the project
* Develop evaluation questions
* How the information will be collected and how it will be provided back to participants
* Internal and external resources available to undertake the evaluation (e.g. staff time, funding)
* The timeframe for the evaluation activities.

A Program Evaluation Framework, in line with the evaluation framework template should be developed when preparing for an evaluation.

## 5.4 Conducting an evaluation

As a matter of good practice, **[Insert organisation name]** collects both qualitative and quantitative information for evaluation of its services and programs. There are organisational tools and templates, such as a template evaluation form, available as resources which can be accessedthrough **[insert name of network drive, hard copy locations or internet site]**. These include:

* Program evaluation client consent form
* Program evaluation feedback forms (staff, clients and stakeholders)
* Program evaluation feedback report template
* Program evaluation data collection user guide
* Program evaluation data collection sheet
* Program evaluation activity log
* Program evaluation report template.

Evaluations should, at a minimum, establish monitoring and feedback systems, determining process measures about how the program was implemented and identify impact and outcome measures to determine the intended and unintended results and benefits of the program/service/project.

Client involvement is also considered integral to effective evaluation of service provision. Clients can be involved through a range of methods, including:

* Focus groups
* Face-to-face interviews
* Surveys
* Suggestion/feedback box
* Feedback raised during project activity
* **[Insert other method].**

A mixture of methods to incorporate client involvement may be required to allow for anonymous input, together with structured and unstructured evaluation methods, with confidentiality guaranteed.

## 5.5 Analysis of information collected

Each performance measure should be summarised and analysed to:

* Compare responses
* Match program objectives
* Look for trends
* Identify issues
* Learn from new information.

## 5.6 Evaluation report

An evaluation report should be prepared using the following outline:

* Acknowledgements
* An executive summary
* Introduction and purpose of the evaluation
* Program background, including an overview of **[name of organisation]** and the program (including the aims and how it was implemented)
* Project inputs and outputs
* Project outcomes
* Implementation and management
* Key success factors
* Key considerations or limitations that might have impacted on the results of the evaluation
* Recommendations for future practice
* Conclusion.

The evaluation report outlining the results achieved is provided to participants, staff, the Board members, and any other external stakeholders involved in the program. Outcomes may also be promoted to the broader sector when possible. The findings are used to review and inform future practice at the organisation. See the Evaluation Report Template for further guidance on content to be included.

# SECTION 6: INTERNAL REFERENCES

## 6.1 Supporting documents

**Program Management Supporting Documents**

* [Training Needs Analysis Template](Supporting%20documents/Training_Needs_Analysis_%20Template.doc)

**Project Management Supporting Documents**

* [Project plan template (can be adapted for project submissions and event plans)](Supporting%20documents/Project%20management/1.%20PM_Project%20plan.docx)
* [Project planning checklist](Supporting%20documents/Project%20management/2.PM_Project%20planning%20checklist.docx)
* [Optional project templates](Supporting%20documents/Project%20management/3.%20PM_Optional%20project%20templates.docx)
* [Gantt chart template](Supporting%20documents/Project%20management/4.%20Gantt%20Chart%20Template.xlsx)

**Event Management Supporting Documents**

* [Event planning checklist](Supporting%20documents/Events/1.%20PM_Events_Planning%20checklist.docx)
* Event management optional templates, including:
  + [Event running sheet template](Supporting%20documents/Events/2.%20PM_Events_runsheet%20template.docx)
  + [Event agenda template.](Supporting%20documents/Events/3.%20PM_Events_Agenda%20template.docx)

**Program Evaluation Supporting Documents**

* [Program evaluation framework template](Supporting%20documents/Evaluation/1.%20PM%20Program%20Evaluation%20Framework.docx)
* [Program evaluation checklist](Supporting%20documents/Evaluation/2.%20PM_Program%20Evaluation_checklist.docx)
* [Program evaluation client consent form](Supporting%20documents/Evaluation/3.%20PM_Program%20Evaluation__client%20consent.docx)
* [Program evaluation feedback forms (staff, clients and stakeholders)](Supporting%20documents/Evaluation/4.%20PM_Program%20Evaluation__Feedback%20forms%20(staff,clients%20and%20stakeholders).docx)
* [Program evaluation feedback report template](Supporting%20documents/Evaluation/5.%20PM_Program%20Evaluation__Feedback%20Report%20Template.docx)
* [Program evaluation data collection user guide](Supporting%20documents/Evaluation/7.%20PM_Program%20Evaluation__Data%20collection%20user%20guide.docx)
* [Program evaluation data collection sheet](Supporting%20documents/Evaluation/8.%20PM_Program%20Evaluation_%20Data%20Collation%20sheet.xls)
* [Program evaluation activity log](Supporting%20documents/Evaluation/6.%20PM_Program%20Evaluation__activity%20log.docx)
* [Program evaluation report template.](Supporting%20documents/Evaluation/9.%20PM_Program%20Evaluation_%20Report%20template.docx)

**Included in the Communications Policy Supporting Documents**

* [Communication distribution list](../2.1%20Communications/Supporting%20documents/4.Com_Communications%20distribution%20list.xlsx)
* [Organisation Communications Audit Template](../2.1%20Communications/Supporting%20documents/1.Com_Communications_Audit_Template.docx)

## 6.2 Related policies

* [Organisational Development Policy](../../1.Governance%20and%20Leadership/4.%20Organisational%20Development/1.4%20Organisational%20development%20Policy.docx)
* [Risk Management Policy](../../1.Governance%20and%20Leadership/5.%20Risk%20Management/1.5%20Risk%20management%20Policy.docx)
* [Financial Management Policy](../../1.Governance%20and%20Leadership/3.%20Financial%20Management/1.3%20Financial%20Management%20Policy.docx)
* [Governance Policy](../../1.Governance%20and%20Leadership/1.%20Governance/1.1%20Governance%20Policy.docx)
* [Client Clinical Management Policy](../../3.Service%20Delivery/3.2%20Client%20Clinical%20Management/3.2%20Client%20Clinical%20Management%20Policy.docx)
* [Work Health and Safety Policy](../../1.Governance%20and%20Leadership/2.Work%20Health%20Safety%20Policy/1.2%20Work%20Health%20Safety%20Policy.docx)
* [Information and Communication Technology Policy.](../2.4%20Information%20&%20Communication%20Technology/2.4%20ICT%20Policy.docx)

# SECTION 7: EXTERNAL REFERENCES

## 7.1 Resources

* Tasmanian Government egovernment

Whole-of-government strategies, policies, resources and tools for information management, information systems and project management to assist the efficient operation of government in Tasmania.

* Tasmanian Government

Project Management Framework Project Management Fact Sheet: Managing Small Projects, Version 1.1, June 2008 - <http://www.egovernment.tas.gov.au/>

* K Aylward, P., 2005, Evaluating AOD Projects and Programs. In N. Skinner, A.M. Roche, J. O’Connor, Y. Pollard, & C. Todd (Eds.), Workforce Development TIPS (Theory Into Practice Strategies): A Resource Kit for the Alcohol and Other Drugs Field. National Centre for Education and Training on Addiction (NCETA), Flinders University, Adelaide, Australia.
* A Bauman & D Nutbeam, 2014, Evaluation in a Nutshell: A practical guide to evaluation of health promotion programs (2nd edition), McGraw-Hill Education, Australia

## 7.2 Websites

* Monash University – Project management webpage

<http://www.its.monash.edu.au/staff/projects/project-management/>

1. Reconciliation Australia, 2010, *Welcome to and Acknowledgement of Country* Factsheet [↑](#footnote-ref-1)
2. Ibid. [↑](#footnote-ref-2)
3. P35, A Bauman & D Nutbeam, 2014, Evaluation in a Nutshell: A practical guide to evaluation of health promotion programs (2nd edition), McGraw-Hill Education (Australia). [↑](#footnote-ref-3)
4. Ibid. [↑](#footnote-ref-4)
5. P148, Ibid. [↑](#footnote-ref-5)