**What is a Project Initiation Document (PID)?**

The PID forms the main document of the project and describes what the project is to achieve, how it will be achieved, who is involved in the project and the risks that may be encountered. This should be the most useful document in terms of helping you to manage your project

**When should it be completed?**

The PID should be completed for all mini, medium and large projects as part of the Project Planning phase. Generally, for key and capital projects this should in line with the business improvement planning process.

**Where does it go for approval?**

The Senior Responsible Owner

When complete delete this box and all of the italicised text which has been provided as guidance to help you complete the document.

**PROJECT DOCUMENTATION**

**Project Initiation Document**

***Deliver a Leisure Improvement Project***

Version: 0.6

Date:06/10/2021

Author: Michael Johnson

Project Manager: Lee Nickson /Edward Clegg.

Senior Responsible Owner: Neil Anderson

Responsible Directorate / Service: Projects & Development

**Revision History**

|  |  |  |
| --- | --- | --- |
| **Revision Date** | **Summary of Changes** | **Version** |
| 12.10.20 | First Draft | 0.1 |
| 08.12.20 | Second Draft | 0.2 |
| 07.04.21 | Third draft | 0.3 |
| 11.08.2021 | Fourth draft | 0.4 |
| 17.09.2021 | Fifth draft | 0.5 |
| 06.10.2021 | Sixth draft | 0.6 |

**Approvals**

|  |  |  |
| --- | --- | --- |
| **Name** | **Date Approved** | **Version** |
| Neil Anderson | 11th August | Version 4 |
|  |  |  |

**Distribution**

|  |  |
| --- | --- |
| **Name** | **Title** |
| Neil Anderson | Assistant Director of Projects and Development |
| Lee Nickson  | Programme Manager |
| Paul Shannon | Commercial Manager Leisure Centres |
| Danny Delvard | Operation Manager Leisure Centres |
| Edward Clegg | Programme Leader – Building Surveyor |
| Anthony Howard | Policy, Performance and Partnerships Manager |
| Michael Johnson | Policy, Performance and Partnerships Officer |
| Brett Spence | Project support – Estates Technical Assistant. |

# Project Overview

Having adopted the new Leisure Facilities Strategy this project mandate is about delivering a program of improvements to the existing leisure facilities (Penwortham, Leyland, Bamber Bridge and South Ribble Tennis Centre) to ensure that they are high quality and accessible for residents from across the borough pushing forward the concept of Leisure Local.

The programme relates to a series of projects which includes:

* + The carrying out the refurbishment of all the Leisure Centres (Penwortham, Leyland, Bamber Bridge and South Ribble Tennis & Fitness Centre) The key aspects of the refurbishment will pick up on the 2016 Condition survey the paisa schedule and then political priority of improvement the look of the centres and the customer experience of using the centres
	+ The commissioning and undertaking of a decarbonisation report to allow the possibility of access to government grants to help reduce the carbon footprint/operating costs of the leisure centres. This work will also pick on some key Mechanical and Electrical improvements at the Leisure Centres

# Objectives

* + To deliver key actions as part of the investment plan for the boroughs existing leisure centres by August 2022.
	+ To support the Borough’s long-term leisure strategy to create a more physically active borough, improving the health and wellbeing of all residents and reducing health inequalities and taking forward the concept of Leisure local as promoted within the adopted Leisure Facilities Strategy
	+ To help reduce the carbon footprint of South Ribble Borough Councils leisure centres - subsequently resulting in the reduction of leisure centre operating costs by the utilisation of more efficient machinery/technology. The Decarbonisation project will also pick up key aspects of improving the Mechanical and Electrical installations at the Leisure Centres

# Scope

**In Scope**

The Project will deliver a program of improvements to the existing leisure facilities (Penwortham, Leyland, Bamber Bridge and South Ribble Tennis Centre)

**Out of Scope**

This project will not include the future leisure management contract arrangements, or any other work identified outside of the investment plan for existing leisure centres.

# Constraints

The constraints that may have a negative impact on the delivery of this project include:

* + Impact of Covid 19
	+ Failure to secure government grant for decarbonisation scheme.
	+ A failure to get refurbishment done on Leisure Centres
	+ Services capacity to allow staff resources to assist with the project
	+ Leisure Investment – Elected Member decisions need to be made in relation the budget allocation.

# Assumptions

* + A decision will be made about the future leisure management contract arrangement’s
	+ South Ribble Borough Council will secure a government grant with the assistance of Environmental Health (Decarbonisation Scheme).
	+ The appropriate project management support and contractor will be procured

# Risks

The risks for the projects are detailed below (control measures yet to be actioned are highlighted in Blue):

| **Risk**  | **Description** | **Impact** | **Likelihood** | **Risk Rating** | **Risk target**  | **Risk Category** | **Risk Response** | **Control** | **Description** | **Owner** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Capital programme not being agreed | Money not available to fund investment plan to current leisure centres | 3 | 2 | 6 |  | Financial  | Treat | Approved budget in the Capital programme | Work closely with Finance to establish budget for investment plan  | Neil Anderson |
| No political decision made on individual projects | Inability to gain Cabinet approval on individual Leisure Projects | 3 | 4 | 12 | 6 | Political | Treat | Work with new administration on future leisure centre options | Need to establish new potential options for delivering a new Leisure centre that is politically supported  | Neil Anderson |
| Project Slippage | Lack of communication either internally or with contractors causes slippage and key milestones are missed leading to increases financial costs and/or detrimental effect on relationships. | 2 | 3 | 6 | 4 |  | Treat | The project team Manager has core team and wider team fortnightly meetings where a project tracker is updated and kept up to date | Ensure that all project members have clear lines of communication available to ensure that accurate and timely information is shared. In doing so any potential project slippage can be identified and remedial action can be taken to mitigate its effects. | Neil Anderson. |
| Failure to secure funding for decarbonisation works. | The Environmental Health team fail to secure Central government funding for the decarbonisation scheme. This results in the extra capital not being received and the initial budget having to cover all aspects of the project initiation documents proposed works | 3 | 3 | 9 | 4 |  | Treat | 1. The council identifies internal funding from other areas such as CIL -106 to support the decarbonisation schemes.
2. Council spends over budget by borrowing money against decarbonisation schemes in realising reduced energy and utility costs through the upgrading of plant and BMS systems.
 |  | Neil Anderson. |

# Project Approach

## The project is being led through Leisure Services and is governed and managed through a Project Team.

### The first stage of the project has been approached through the use of the 2016 condition surveys carried out at the Leisure Centres and also the paisa agreement which we have in place with SERCO as part of the Leisure Contract

### The initial phase of the project has been to ensure that the Leisure Centres are compliant and are Health and Safety safe. This work has taken place largely using finance inside the paisa agreement and in line with the Leisure Contract. The approach taken to achieve this has been to directly work with SERCO our previous Leisure Contractor to ensure compliance work linked to the condition surveys has been undertaken. This has largely involved work within the plant rooms of the centres and looking at issues such as fire safety compliance. This work has now been completed or nearing completion

### The second strand of work has been the completion of the Dilapidations work associated with the end of the current SERCO

contract in March 2021. This work has now been completed and signed off

iv The third strand of investment work will be the enhancement and improvement of the centres using the funding in the capital. The

proposed work is outlined below.

The approach to deliver this work will be to work within a project management framework teams within the Commercial Service Directorate. We will include the new Leisure Management service as part of the project team. The project team will also work closely with the carbon reduction team within Environmental Health to commission a report regarding decarbonisation and the subsequent reduction in operating costs at the leisure centres - (energy and heating)

Outline Business Benefits & Desired Outcomes

| **Ref No.** | **Identify the Benefit*****(a)*** | **Current Position****(As Is)*****(b)*** | **Quantify the Benefits****(To Be)*****(c)*** | **How will the benefits be measured?*****(d)*** | **When will the benefits be delivered?*****(e)*** |
| --- | --- | --- | --- | --- | --- |
| B1 | Enhanced health and wellbeing for the residents that will utilise the facilities. | Facilities are quite run down and are in need of improving to encourage use. | Increased user experience therefore increasing usage of centres. | This will be measured through the completion of planned works and through monitoring the usage of the facilities. | All by August 2022 |
| B2 | Reduce carbon footprint/Reduced operating cost for centres with regards to heating/electricity usage. | Other than some LED light and change of pool chemicals there is still a lot needed to be done | Improved Environmental impact | Financial savings | All by August 2022 |

# Project Resources

**9.1 Detailed Project Plan –**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Milestone** | **Task**  | **Duration** | **Start** | **Finish** | **Resource** |
| April to December 2020 | Completion of Compliance and Health and safety work within Leisure Centres | 8 months | April 2020 | December 2020 | The Council’s committed Paisa work programme led by the Leisure Contract and projects manager and the contracts manager for SERCO |
| January Cabinet and Council Meetings | Decision to take Management of Leisure Centres back in-house | 1 month | 1 Jan 2020 | 31 Jan 2020 | Leisure Contracts and Project Manager |
| March 20 21 | Completion of the Dilapidations work in relation to the end of the SERCO contract. | 3 Months | Jan 2021 | March 2021 | The Council’s committed Paisa work programme led by the Leisure Contract and projects manager and the contracts manager for SERCO |
| June 2021 | Commission and undertaking of decarbonisation report on leisure centres | 2 Months  | April 2021 | August 2021 | Finance, specialist consultants and Environmental Health officers |
| June 2021 | Finalise scope of individual projects | 2 Months | June 21 | July 21 | Project team to finalise scope of individual Leisure Projects |
| Establish procurement route for work to take place on individual Leisure Projects | Establish procurement route and timetable for the improvement and enhancement work to the existing Leisure Centres | 4 months | May 2021 | September 2021 | Project team with support from Procurement and Finance sections of the Council |
| November 21Complete procurement exercise to appoint suitable contractors for the individual Leisure Projects.  | Carry out procurement exercises to recruit suitable contractors to carry out the individual  | 4 months | July 21 | January 22 | New In-house Leisure Services team supported by Commercial services Directorate projects team with the £1.3m budget in the Capital programme |
| Completion of Projects  | Carry out improvement and enhancement work at Leisure Centres | 11 months | November 21  | November 21Finish External DecoratingDecember 22Completion of Car Park project at Tennis CentreFebruary 22Completion of Reception projects August 22New Gym equipment project completion in LeylandDecarbonisation projectAugust 22 depending on Government funding | Leisure Refurbishment project Team |

## Capacity Planner

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Name** | **Service** | **Role & Responsibility in the Project** | **(Date) From**  | **(Date) To** | **No of days** |
| Neil Anderson | Projects & Development | SRO | April 21 | August 2022 | 15 months |
| Lee Nickson | Leisure | Project Manager | April 21 | August 2022 | 15 months |
| Edward Clegg | Facilities | Project Lead | 05/07/2021 | 31/12/2021 | 6 months |
| Melanie Berry | Environmental Health | De-carbonisation project Lead | April 21 | August 2022 | 15 months |
| James McNulty | Finance  | Budget allocation | April 2021 | August 2022 | 15 months |
| Laura Barton-Williams | Communications  | Resident awareness | June 2021 | August 2022 | 9 months |
| Janet Hinds / Elaine Evans | Procurement  | Tender and award | April 21 | November 2021 | 6 months |
| Jason Ascroft | Facilities | Advice and Guidance | April 21 | August 2022 | 15 months |
| Brett Spence | Estates | Project Support | April 21 | August 2022 | 15 months  |
| Danny Delvard | Leisure Centres | Advice and Guidance | April 21 | August 2022 | 15 months |
| Paul Shannon | Leisure Centres | Advice and Guidance | April 21 | August 2022 | 15 months |

**9.3 Project Budget**

* Capital Budget

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **£ (Value)** | **Budget approved (Y/N)** | **Expected approval date** |
| Penwortham leisure Centre – Sports Hall Floor Re-surface – Complete  | £35,000 | Y | Approved - complete |
| Leisure Centre – Painting of external cladding | £97,000 (Revenue) | Y | EMD Sep 2021 |
| South Ribble Tennis Centre – Car Park Extension | £180,000 | Y | Cabinet report Sep 16th 2021 |
| Penwortham leisure Centre – Reception Area Refurbishment incorporating the Squash court conversion. | £60,000 | Y | Nov Cabinet 2021 |
| Bamber Bridge Leisure Centre -Reception Area Refurbishment | £80,000 | Y | Nov Cabinet 2021  |
| South Ribble Tennis Centre – Reception Area Refurbishment | £20,000 | Y | Nov Cabinet 2021  |
| Leyland Leisure Centre – Reception Area Refurbishment | £80,000 | Y | Nov Cabinet 2021  |
| South Ribble Tennis Centre – Courtyard | £6,000 | Y | Approved |
| Gym Equipment replacement (Leyland Leisure centre) | £500k This will need an accompanying business plan doing when we go to Cabinet | Y | February Cabinet 2022 |
| Decarbonisation report - Complete | £22,680 | Y | Approved - Completed |
| Bamber Bridge Leisure Centre – Plant replacement (potential grant funding) | TBC in-line with Government funding | Y | All projects below subject to national funding bid and cabinet approval \*\* |
| Leyland Leisure Centre – Plant replacement (potential grant funding) | TBC in-line with Government funding | Y | \*\* |
| Bamber Bridge Leisure Centre – Air handling units (potential grant funding) | TBC in-line with Government funding | Y | \*\* |
| Leyland Leisure Centre – Air Handling Units (potential grant funding) | TBC in-line with Government funding | Y | \*\* |
| Penwortham Leisure Centre – Air Handling Units (potential grant funding) | TBC in-line with Government funding | Y | \*\* |
| Penwortham Leisure Centre – Plant replacement (potential grant funding) | TBC in-line with Government funding | Y | \*\* |
| Bamber Bridge Leisure Centre – Roof (potential grant funding) | TBC in-line with Government funding | Y | \*\* |
| Bamber Bridge Leisure Centre – Curtain Walls (potential grant funding) | TBC in-line with Government funding | Y | \*\* |
| Penwortham Leisure Centre – Roof (potential grant funding) | TBC in-line with Government funding | Y | \*\* |
| Penwortham Leisure Centre – Curtain Walls (potential grant funding) | TBC in-line with Government funding | Y | \*\* |

**9.4 Impact on other services**

|  |  |  |  |
| --- | --- | --- | --- |
| **Service area/Team** | **Item (description of work involved i.e. procurement of architect)** | **Duration****From -To** | **Budget confirmed** **YES/NO/TBC or N/A** |
| Planning and Building Control | Achieving necessary planning or building control permission for each Project | Jan- December 2021 | Yes |
| Procurement Services | Working with Procurement services on tendering key bits of work as part of the programme of works | Jan-December 2021 | Yes |
| Environmental Health | Working with EH carbon reduction team to develop carbon reduction teams at the Leisure Centres as part of the refurbishment programmes | Jan-December 2021 | Yes, for some |
| Commercial Services Directorate Project Team | Support to Leisure Services on individual schemes as required | February 21 to March 22 | Yes |

9.5 Project Timelines.

**Leisure centre External Decoration Project.**



**Leisure Centre Reception Refurbishment Project.**



**Gym Equipment Replacement Scheme.**



**South Ribble Tennis Centre Carpark Extension.**



*10.*

#  Project Communications

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Stakeholders** | **Details (Involve / Engage / Partners etc)** | **Information Required** | **Information Provider** | **Frequency** | **Method of communication** |
| Customers/Users | Involve / Engage | Details of works to take place, closures of areas of centres to undertake work, implication on any activities/ programme changes.  | Project Lead / Communication Team | As and when required on commencement of any work to be undertaken | Social media, press release, posters, flyers |
| Internal Staff/Members / Penwortham Priory Academy | Involve / Engage | Updates on timescales, feedback | Project Lead / Communication Team | As and when required on commencement of any work to be undertaken | Staff meetings |

**Project Initiation Document (PID) Checklist**

*This checklist should be completed by the author of the PID before being checked by the Senior Responsible Owner and project support.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Checklist** | **Author Check** | **Notes** | **SRO Check** | **PMOCheck** |
| Has each section been completed? | Not all | Need to insert the project plan | x | x |
| Is it clear what is being delivered? |  |  |  |  |
| Is it clear how the project is going to be delivered? | No | Will need to agree a procurement strategy | x | x |
| Is it clear who needs to be involved in the project? | Partly | Need to understand project management support for the work | x | x |
| Are all members of the project team aware of their role and responsibilities? | Partly | Need to establish clear project for the works | x | x |
| Have all relevant line managers been consulted? | Yes |  |  |  |
| Is there enough existing capacity to deliver the project | No | The work needs to be tied into new structure for the in-house Leisure Services | x | x |
| Have all key project team members had project management training? | Yes |  |  |  |
| Are the timescales realistic? | Yes | Need to define project plan | x | x |
| Have proposed costs been checked by finance to establish if they are capital or revenue costs and if the project will create any revenue implications for other directorates? | Yes | The revenue consequences will be affected. It is hoped they will come down particularly with regards the Environmental improvements works | x | x |
| Can the project be completed within existing capacity? | No | Need dedicated project management support | x | x |
| Have the resource implications for other services been considered? | No | As with lots of projects consideration needs to given to support services such as procurement in supporting these projects going forward | x | x |
| If the project is a large project, has a separate Communications Plan been written? | No | Communications with be wrapped up as part of publicising the new Leisure Facilities strategy | x | x |
| Has the Risk Register been updated? | Yes partly | This needs to be revisited | x | x |
| Has an Issues Log been established? | No | The needs to be done | x | x |
| Has a Lessons Learned Log been established? (Large & medium projects only) | no | This needs to be done | x | x |