

Project Handover Checklist

Project Handover Checklist				
Project / Department				
Project no.		Start Date		
Section 1 – Handover Section 2 – Immediate Commercial Action Section 3 – Familiarization Section 4 – Initial Overall Planning Section 5 – Staffing		Section 6 – Administrative Action Section 7 – Mobilisation and Site Establishment Section 8 – Detailed Planning Section 9 – Launching the Work		
Section 1 Handover				
No.	Items to be received by the Project Manager	Action by	Action date	Completed (initial / date)
1A	From EXCO or Delegated appointee: <ul style="list-style-type: none"> - A Position Description. - Full details of the project. - Staffing details. - Softcopies templates for the monthly Report 			
1B	From Estimating Manager / Bid Leader: <ul style="list-style-type: none"> - A copy of the Letter of Award/signed Contract. - A copy of the Risk Assessment Checklist Version C. - A precis of the project details with any special points. - A precis of the client's organisation, background and needs. - A set of Tender Files containing: <ul style="list-style-type: none"> • A printout of the final estimate agreed to the tender. • Details of how the estimate was put together. • Softcopies of the estimate (disk/CD/e-mail). • A set of the tender drawings. • Copies of subcontractor/supplier quotations and analysis with any correspondence, agreements or arrangements. • Copies of pre-award correspondence. - A list of End of Project Reports available and how to borrow/obtain a copy if required. The section of post-project assessment of suppliers/subcontractors performance should be highlighted. - List of client preferred/recommended subcontractors/ suppliers. 			
1C	From Commercial Manager: <ul style="list-style-type: none"> - A precis of the project from a commercial viewpoint. - A precis of the insurance requirements for the Project. - Softcopies of subcontracting document templates: <ul style="list-style-type: none"> • Forms of Subcontract. • Design Consultancy Agreement. • Pre-qualification Questionnaire. • Post-tender Interview. • Subcontract Order Approval form. 			

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	<ul style="list-style-type: none"> Subcontract Variation form. 			
1D	From Chief Accountant: <ul style="list-style-type: none"> A precis of Company policy/requirements on project budgeting, cost forecasting and reporting. A précis of the project cost codes systems. 			
1E	From Human Resources Manager: <ul style="list-style-type: none"> A precis of Company policy and legislative requirements on staff & labour recruiting, managing and training. CV's and details of existing personnel transferred to the Project. A list of personnel currently/soon to be available from other Projects including their CV's. 			
1F	From Planning Manager: <ul style="list-style-type: none"> The final tender project programme Critical Path Summary Document Summary of Engineering and procurement Key outputs required Spreadsheets related to methods and outputs used. Softcopies of the programme and spreadsheets (disk/CD/e-mail). A precis of the project from a planning viewpoint.			
1G	From Engineering Manager: <ul style="list-style-type: none"> A copy of the Bid Technical requirements (Employer's requirements for D&B contract) and submitted technical proposal. A copy of any consultancy agreements made. A list of consultants deemed suitable for various elements of the works. 			
1H	From Quality Manager: <ul style="list-style-type: none"> Copy of the Bid Quality proposal (if submitted). A precis of the Company & Project Mgt Systems. A precis of the usage of Work Method Statements (WMS), Insp & Test Plans (ITP), Project Instructions (PI), and Forms (FM). A precis on Project Quality Cost reporting. 			
1I	From HES Manager: <ul style="list-style-type: none"> Copy of the bid Health & Safety proposal (if submitted) A precis of the Company and Legislative requirements for Safety Management. A precis of the usage of Project Safety Plan (PSP), Safety Project Instructions (PI) and Job Hazard Analysis (JHA). A precis of the Company requirement on Accident/ Incident reporting. 			
1J	From HSE Manager: <ul style="list-style-type: none"> Copy of the bid Environment proposal (if submitted) A precis of the Company and Legislative requirements for Environmental Management. A precis of the usage of Project Environmental Plan (PEP), and Significant Environmental Aspects. A precis of the Company requirement on Env Accident/ Incident reporting. 			
1K	From Admin Manager <ul style="list-style-type: none"> Hardcopies of all standard forms & templates 			

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	- Softcopies of all standard forms.			
1L	<p>From IT Manager</p> <ul style="list-style-type: none"> - If network design was completed at time of estimating: <ul style="list-style-type: none"> • A precis of the network status • A precis of network standards and configurations • Vendor contact details and support information - If no network design is in place: <ul style="list-style-type: none"> • The Project Manager will either work with an in house IT Manager to establish a suitable design <p>In accordance with current standard OR</p> <ul style="list-style-type: none"> • Submits the proposed design for final approval to the In house IT Manager for implementation approval. <p>If site locations are unknown at the point of engagement, the Project Manager will supply the IT Manager with the following information as soon as available:</p> <ul style="list-style-type: none"> • Address of proposed site(s), preferably with a telephone number of the building (if existing) • Number of IT users at each site • Proposed services (ERP, email, File & Print, Intranet, etc) • Proposed method of site support (Project Staff or outsourcing) <ul style="list-style-type: none"> - Softcopies of: <ul style="list-style-type: none"> • Network Use Agreement • Backup Procedure • Service request form for Account Creation • Service request form for Account Deletion • Service request form for Access Change • As built Network Drawings 			
1M	<p>From Risk Manager</p> <ul style="list-style-type: none"> - Risk matrix & risk sheet. 			
Section 2 Immediate Commercial Action				
2A	<p>Ensures that the necessary insurance cover has been arranged:</p> <ul style="list-style-type: none"> - Contract works. - Third Party Liability. - Plant. - Marine. - Workers Compensation. - Professional Indemnity. - Personal Accident - Life Coverage. - Medical Coverage for staff. 			
2B	<p>Ensures that the necessary security in the form of bank guarantees or insurance bonds or other agreed bond has been arranged with the client.</p>			

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2C	Complete all statutory requirements needed to proceed, such as local authorities approvals and permits, and ensure that all conditions under which such are issued have been complied with.			
2D	Ensures that the following client's requirements are considered: <ul style="list-style-type: none"> - Protocol. - Submissions, approvals/release. - Methods. - Reporting. 			
Section 3 Familiarisation				
3A	Examine the contract documents in detail, including: <ul style="list-style-type: none"> - General and Special Conditions of Contract. - Drawings/ Specifications/Standards/Codes. - Tender submission documents and Post-tender correspondence. - Letter of Award. 			
3B	Examine the Estimate, including: <ul style="list-style-type: none"> - Method. - Staff/Labour. - Programme/Schedule. - Plant purchase and hire. - Quotations for subcontract and major materials. - Cost estimate. - Financing. - Risks/Opportunities. 			
3C	Advise the EXCO of any apparent or potential contractual/construction problems: <ul style="list-style-type: none"> - Estimate allowances. - Project Programme. - Subcontractors at Tender. - Suppliers/Fabricators at Tender. - Plant and equipment at Tender. - Onerous terms and conditions. 			
3D	Meet the Client's Representative to establish routines, set up regular points of contact, and resolve areas of ambiguity, e.g. site and management meetings, client procedures and approvals.			
3E	Select and/or review the standard Form of Subcontract and prepare any specific terms and conditions in conjunction with the Commercial Manager.			
3F	Carry out detailed site/area/town/district reconnaissance: <ul style="list-style-type: none"> - Check the items needed for site establishment as listed in Section 7 of this Checklist. - Examine access to site. Any earthwork or additional work required? Overhead obstructions? - Site clearing; accessibility and extent of work. - Is rock excavation likely? If so, can it be ripped? 			

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	<ul style="list-style-type: none"> - Any adjacent underground, overhead or undersea services liable to possible damage? - Local suppliers, subcontractors, plant, equipment and labour availability. - Local authorities regulations like road closures, movement of construction vehicles, noise and dust. - Identify and give consideration to any local lobby groups, especially environmental groups, resident associations and village headmen. - Moving' projects such as pipelines, railways, highways, cabling, etc need continuous recon and familiarisation through the routes. 			
Section 4 Initial Overall Planning				
4A	Planning with staff covering the following: <ul style="list-style-type: none"> - Engineering / Design planning. - Identification of work methods, controls, processes, techniques, equipment and resources. - Contract programme. - Procurement. - Labour requirements. - Plant requirements. - Staff requirements and organisation. - Cost control and cash flow. - Public relations. - Job Hazard Analyses and Risk Assessments - Environmental Aspect and Impacts, and determine monitoring and mitigating systems. 			
4B	Compare the above with the Estimate and discuss the above overall planning with the General Manager.			
4C	Ensure continuing responsibilities for the above are assigned/ delegated to the project team.			
Section 5 Staffing				
5A	Review, revise and authorise the Project Org. chart.			
5B	Liaise and obtain approval to appoint and/or recruit staff according to the agreed staffing plan.			
5C	Issue Position Descriptions to each staff member that clearly identifies responsibilities and levels of authority including issuing of standard forms and whose responsibility it is to administer them.			
5D	Ensure all statutory employment requirements are complied with.			
5E	Ensure all bank accounts for the Project and employees have been set up, including payroll services.			
5F	Ensure that all project staff members are inducted into the project team and familiarised with project details.			
5G	Ensure that all project staff and labour undergoes Safety Induction before allowed to work on site.			
5H	Ensure that all Project staff undergo QA/ QC induction (familiarisation of QA/ QC requirements) prior to starting on site.			
5I	Identify training needs of staff members and plan training in conjunction with the H R Manager.			
Section 6 Administrative Action				
6A	Review, authorise and issue the Project Management Plan (PMP), including copies to the client.			
6B	Ensure a schedule is developed to identify what are the projected, when to complete, and by whom; the following documents are to be in place:			

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	<ul style="list-style-type: none"> - Work Method Statements (WMS) - Inspection and Test Plans (ITP) - Project Instructions (PI) - Forms - Job Hazard Analyses (JHA) - Shop Drawings - Material Submittals 			
6C	Arrange availability of computer hardware including printers, modems and communication equipment.			
6D	Ensure the Contract Programme is authorised and issued.			
6E	Ensure that the Project Correspondence and Filing systems are established. Discuss feasibility of using an electronic document management software.			
6F	Ensure that the Drawing Control system is established. Coordinate with IT Manager for any software required.			
6G	Ensure that Project Material Procurement and Store Control systems are established.			
6H	Ensure subcontracting scopes and documentation are identified and scheduled.			
6I	Ensure that the Project Accounting system (Accounts Payable, Petty Cash) is established.			
6J	Ensure that the Project cost recording and reporting systems are established.			
6K	Set up system of progress recording, site diaries, and photographic recording.			
6L	Ensure that monthly/weekly Project progress reporting is established.			
6M	Ensure site productivity system and reporting is established.			
6N	Establish systems and registers for: <ul style="list-style-type: none"> - Request For Information (RFI) - Design Change Requests (DCR) - Site Instruction (SI) - Confirmation of Verbal Instruction (CVI) - Specification Change Notification (SCN) 			
Section 7 Mobilisation and Site Establishment				
7A	Ensure that site boundaries, markings and controls are checked, using a 3rd Party Surveyor if necessary.			
7B	Establish site layout detailing location: <ul style="list-style-type: none"> - Site offices. - Sheds - Toilets - Workshops - Security facilities - Delivery and laydown areas - Store containers/compound - Intra-site traffic flow - Fixed plant & equipment (compressors, skid tanks, refuse skips, tower cranes, etc) 			

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	<ul style="list-style-type: none"> - First Aid facilities - Canteen facilities - Labourers living quarters - Staff car parking areas 			
7C	Make applications and install connections to: <ul style="list-style-type: none"> - Water. - Sewer - Power - Telephones - Internet/e-mail 			
7D	Undertake condition survey, if required, and examine, photograph and document existing condition/damage of adjoining building/sites.			
7E	Source local suppliers, check range of goods and stock carried, and set-up accounts/discounts/delivery/payment terms (hardware, timber, cement, aggregate, bricks, stationery, office equipment and furniture, computer ware, pantry supplies, etc).			
7F	Set up site administrative office(s) with complete power, water, telephone, office equipment, furniture, and pantry facilities.			
7G	Source and arrange for temporary accommodation/ housing for site staff and employees.			
7H	Determine requirement for daily transportation to site for project staff.			
7I	Erect project signboard, site signs, Company logos, Safety posters/ banners and bulletin boards.			
7J	Locate the nearest hospital(s) and 24-hour clinics; determine their emergency facilities and contact numbers.			
7K	Develop emergency procedures and put up contact numbers in a prominent manner.			
7L	Set-up adequate fire-fighting facilities around the site.			
7M	Construct all necessary concrete bunds around fuel/chemical storage to contain spills.			
7N	Provide adequate markings/warning signs on locations/route of buried/hidden services (power/phone cables, water pipes) to prevent accidental damage.			
7O	Arrange for rubbish disposal services for the Project Site and janitor services for the Site Office(s).			
Section 8 Detailed Planning				
8A	From the Construction Programme, prepare resource requirement charts/ summaries/spreadsheets to cover: <ul style="list-style-type: none"> - Manpower - Major items of Plant 			
8B	Finalise and issue the Project Quality Procedures & Health, Safety & Environmental Procedures in conjunction with the Quality & Safety Manager.			
8C	Prepare and issue WMS, ITP, PI, Forms according to the schedule developed in item (6B) of this Checklist.			
8D	Prepare and issue Job Hazard Analysis (JHA) and Risk Assessment Reports (RAR) for processes scheduled to commence.			
8E	Implement environmental monitoring systems identified in item (4A) of this Checklist.			
8F	Ensure pre-award assessment visits to short-listed subcontractors/ suppliers/ fabricators premises are conducted prior to award.			
Section 9 Launching the Work				
9A	Ensure that orders are placed for material and subcontracts are awarded in accordance with the schedules.			

No.	Items to be received by the Project Manager	Action by	Action date	Completed (initial / date)
9B	Ensure that plant is mobilised and labour recruited in accordance with the requirements.			
9C	Ensure all documentation (PMP/ PQP& HSEP/ WMS/ ITP/ PI/ JHA/ RAR /Forms/ DCR/ RFI/ SI) are available at point of use and are being used correctly.			