

Project Manager Handover Requirement Checklist

PURPOSE

The following is the minimum requirements for the successful transfer for handover from the contractor to the University on all projects. This is an internal document to be used specifically by IFS Project Managers to ensure all obligations have been addressed. Please see **Appendix 1** for a step-by-step guide to the interface between Campus Services Team, Program Delivery Team and stakeholders at handover to operational phase. Requirements may vary depending upon size and scale of the project but all the below require acknowledgement in the checkpoints provided. Projects will be split into 2 categories:

- Major Projects – All projects that are using the GC21 Contract Suite or an alternative contract type with a value over \$1M.
- MW21 and MMW Contracts – All projects using the MW21 or MMW Contract Suites.

The Handover process will be organised by the Project Manager (PM). The Asset Transition Manager (ATM) will co-ordinate Campus Services team input and sign off to ensure a consistent project handover process.

NOTE: ALL the below need to be addressed and actioned before Completion of a Project

PROJECT NAME	EAM NUMBER

PROJECT HANDOVER MEETING

It is a requirement that a Project Handover meeting is held between the IFS PM, IFS Campus Services, Principal Contractor, and Design Team. For Major Projects this is to be at least **4 months prior to Completion**. For projects using the MW21 or MMW this meeting is to be at least **4 weeks prior to Completion**.

Action	Yes	No
Project Handover Meeting with IFS Campus Services and Principal Contractor		

LOCKS AND KEYS

Where a project has involved the installation of doors with locking requirements, the Project Manager will be responsible for engaging with the Campus Services Facilities Technical Officer and the incumbent Building Services Maintenance Contractor to create the schedule, and install the UON required door cylinders. Sufficient time should be allowed to ensure ordering and installation is coordinated with the handover of the project.

Action	Yes	No	Not Applicable
Meeting with Facilities Technical Officer and Building Services Maintenance Contractor			

CONTRACTORS COMPLETION PLAN

Major Projects require the Works Contractor to submit a Completion Plan outlining all required actions for Testing, Commissioning and Training, and all supporting documentation that may be required. The plan should also outline the schedule for these activities which will allow IFS Campus Services staff to make themselves available for the required attendance. Contracts using the MW21 and MMW Contracts may require the Completion Plan depending upon the complexity of the works.

Action	Yes	No	Not Applicable
Contractors Completion Plan			

DRAFT OPERATIONS & MAINTENANCE MANUALS

Major Projects require the submission of DRAFT Operations & Maintenance Manuals (O&Ms). These documents should be included with the completion Plan to allow sufficient review time for the IFS Campus Services Team. All O&Ms are to be relevant to the project only, not include sales brochure items and not be padded out to look detailed. The MW21 and MMW Contracts do not require draft versions but must adhere to the same standards.

Action	Yes	No	Not Applicable
DRAFT Operations and Maintenance Manuals for IFS Campus Services Review			

TESTING, COMMISSIONING AND TRAINING

For all contracts, it is a requirement that the IFS Campus Services Team is scheduled to participate in all Testing, Commissioning, and Training. The attendance may be dependent upon the specific area of expertise. There should be sufficient planning and timing agreed upon to ensure the availability of the required member of IFS staff to attend and must be fulfilled before Completion is approved.

Action	Yes	No
Testing, Commissioning, and Training with IFS Campus Services		

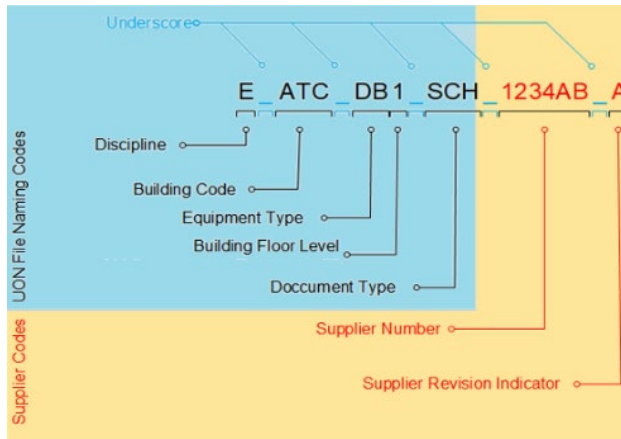
LICENCES, CERTIFICATES & REGISTRATIONS

Each project will have a number of required statutory and authority documents which have to be submitted and accepted by IFS at Completion of the Project. Specialist equipment may require assistance from Campus Services for particular Licence Registration requirements. The number of documents will vary depending on the size of the project, but all projects will require submission of documents other than Drawings, O&Ms, and Warranties.

Action	Yes	No
Licences, Certificates, and Registrations		

DRAWINGS

All drawings including As-Built, Line Drawings and Small-Scale Plans must be submitted in PDF and DWG format adopting the naming conventions set out by IFS. The naming convention can be seen below:



Updates will also be required to Fire Evacuation Plans (if required) and where survey drawings are undertaken – supplied in a format that can be loaded into the University GIS.

Action	Yes	No
As-Built and Line Drawings		
Small Scale Plans		
Fire Evacuation Plans		
GIS		

ASSET CAPTURE DATA AND DECOMMISSIONED ASSETS

All asset data must be recorded in the asset data spreadsheets linked to each trade. Decommissioned asset data also needs to be recorded in the respective spreadsheet. It is expected that for all Major Projects that all the spreadsheets will need to be used. Where the MW21 and MMW Contracts are used it may be possible that only 1 spreadsheet is required to be completed.

Action	Yes	No
Asset Capture Data inc. Stickers and Register		
Decommissioned Asset Data		

FINAL OPERATIONS & MAINTENANCE MANUALS AND WARRANTIES

The FINAL O&Ms must be submitted before Completion is achieved. The final documents must have been reviewed and approved by the respective IFS Campus Services Team member for the area of expertise. Warranties for Products, Plant and Equipment should also have been received.

Action	Yes	No
FINAL Operations and Maintenance Manuals Approved		
Warranties		

DOCUMENTATION STRUCTURE

All of the project documents are to be submitted electronically and should meet the structure as set out below:

Project Name

1. Trade Activity (Building, Electrical, Fire, Hydraulic, Mechanical, Specialist, etc)
 - 1.1 Directory
 - 1.2 Equipment and Product Information
 - 1.3 Testing, Commissioning and Training Data
 - 1.4 Licences, Certificates, and Registrations
 - 1.5 Operation & Maintenance Manuals and Warranties
 - 1.6 Drawings
 - 1.7 Asset Data Capture and Decommissioning

HANDOVER COMPLETION

Where a Project is deemed to have completed all Handover requirements outlined in the Completion Plan the positions listed in the following table need to sign and date, acknowledging that the above requirements have been completed.

Role	Name	Signature	Date
Asset Transition Manager			
Systems Co-ordinator (if required)			
Asset Engineer Electrical (If required)			
Asset Engineer Mechanical (If required)			
Post Completion Period Commence			
Post Completion Period End			

POST COMPLETION REQUIREMENTS

It is a requirement that a Post Completion (DLP) meeting is held prior to commencement of the Post Completion Period, between the IFS PM, IFS Campus Services, and the Principal Contractor. This meeting is a requirement regardless of what contract is to be used and should be conducted at a time that allows for any required planning and management requirements.

Action	Yes	No
Post Completion Requirements Meeting with IFS Campus Services and Principal Contractor		

FINAL COMPLETION

Before a Project is deemed to be at Final Completion it is required that the PM chair a meeting with respective IFS Campus Services members to ensure that all issues that have been raised and/or identified during the Post Completion Period have been actioned. This should be at least 1 month prior to ensure the contractor has the necessary time to address any required actions.

Action	Yes	No
All Defects and Issues Identified have been actioned to the satisfaction of the of AD Campus Services		

Where a Project is deemed to be at Final Completion (the end of the Post Completion Period) the positions listed in the following table need to sign and date, acknowledging that the above requirements have been completed.

Role	Name	Signature	Date
Asset Transition Manager			
Asset Engineer Electrical (If required)			
Asset Engineer Mechanical (If required)			
Senior Manager – Asset Management			
IFS Project Manager			

This completed document will be included in the Handover Documents for all Projects.

APPENDIX 1 – PROJECT HANDOVER PROCESS

The following is a step-by-step guide to the interface between Campus Services Team, Program Delivery Team and stakeholders at the critical stages of project delivery (Project Lifecycle), in particular handover of a project to the client (University of Newcastle) at the end of construction to the operational phase. The Handover Process will be organised by the Project Manager (PM) and the Asset Transition Manager (ATM) will co-ordinate input by Campus Services Team to ensure a consistent streamlined project handover process.

1.	The Major Projects and MW21 and MMW Contracts Project Handover Standards, templates and checklists are in Design Standards on the IFS Hub SharePoint Site .
2.	All Handover documentation is to be saved on the SharePoint Project Closeout folder for review and approval.
3.	The IFS Project Handover & Post Completion Team General Microsoft Teams site will be used to co-ordinate review of handover documentation and closeout of projects. Please contact the ATM if you do not have access to this team's site.
4.	A separate <i>Channel</i> will be created by the ATM for the project and under the <i>Files</i> tab the PM will add a link to the handover documentation in the Project Closeout SharePoint folder when <u>all</u> the handover documentation (Asset Capture, Warranties, Drawings, O&Ms, Licences, Certifications and Registrations) is ready to be reviewed. No documents will be stored within the Teams site. The <i>Posts</i> tab will be used for questions, updates and communications between PM, ATM and Campus Services Team.
5.	PM will arrange times for the Campus Services Team, PM and Principal Contractor to witness and attend testing, commissioning and training ready for operational phase.
6.	ATM will request each Campus Services team member, depending on the project type and scope, to open the <i>Channel</i> and the associated <i>Files</i> tab and advise by <i>Post</i> on the <i>Channel</i> if any documents are missing from their perspective or if everything is supplied, confirm their approval.
7.	The PM for each project can answer any <i>Posts</i> directly if it pertains to request for additional information or clarification. Any additional documentation is to be added to the Project Close Out SharePoint folder not to the Teams site. Once all relevant approvals have been received, the required Handover Completion signoffs on the PM Checklist will be completed and the ATM will advise the PM that the project documentation handover has been completed.
8.	Once Handover Completion has been achieved IFS Systems Co-ordinator will move the relevant documents to the working locations on the IFS Hub SharePoint site and the <i>Channel</i> will be amended to include the word 'Transferred' and hidden.
9.	Once all requirements have been met at the end of the Post Completion Period, the required Final Completion signoffs on the PM Checklist will be completed and the ATM will advise the PM that final completion of the project has been achieved. The fully executed PM Checklist is to be saved in the Project Closeout Folder.
10.	Once Final Completion has been achieved the ATM will amend the Channel to include the word 'Completed'.