

Appendix 8 – PMO Delivery Checklist

Checklists to be completed by S106 PMO Project Manager

PROJECT ASSESSMENT AND DELIVERY INITIATION *(Completed by PMO)*

0. Commissioning Summary

Checklist	Information	Completion Date
Project Manager		
Project Title		
Project Location		
Project Allocation Number (HC-S106-XXX)		
PRF Review Undertaken		
Project Proposal		
S106 Contribution		
FIN Code		
Alignment to S106 Agreement	Does the project proposal match the gain description from the master spreadsheet?	
Date of Approved Commission		
Early Engagement – Internal & External	Email or Initial Contact	

1. Options and Feasibility

Checklist	Information	Completion Date
Client Engagement Meeting	<p>Agenda Example</p> <ul style="list-style-type: none"> • Introduction – you and your role in delivery • Overview of PRF and S106 £ allocated • H&S considerations • Project Discussion / Development including procurement advice • Next Steps 	
Site Visit Required?	Please use Site Visit Note Template	
Are any Statutory Approvals Required for the project to proceed?	<p>Do any of the below apply?</p> <ul style="list-style-type: none"> • Planning Consent • Building Regulations • Listed Building Consent • Landlord Approval 	

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H&S Implications / Asbestos Management	<ul style="list-style-type: none"> • CDM Regulations • Notification to the HSE will only be required for projects last longer than 30 working days and have more than 20 workers working simultaneously at any point in the project; or. • Exceed 500 person days. • Asbestos Management Plan? Is one available • NOTE: Building built post 2000 are unlikely to contain asbestos, but that is not certain. • How intrusive are the works? Will we be drilling into walls or potential disturbing ACM's (Voids) • Is an R&D Type 2 required? 	
Estimated Timescale	Estimate a rough timescale to the delivery of the project	
Projected Programme added to Verto?	Update on Verto	
Relevant Documentation Uploads to Verto?	Upload	
Sign-off Consultation with Ward / Parish / Organisation / Client	Ensure fluid communication both internally and externally.	

2. Planning & Design

Checklist	Information	Completion Date
Has Procurement Exercise & Tender Report with available budget analysed	<p>Requirements:</p> <ul style="list-style-type: none"> • Less than <£25k – best value. Aiming for 3 quotes and good levels of cost comparison • Value £25k > £75k – E-Portal Tender. Must go out to four contractors. Aiming for 4 quote return if possible • Value £75 > E-Portal Tender. Open Tendering 	
Check compliance with CPR's	Contract Procedure Rules	
Completion of RoOD (If required)	Only applicable to projects over >£50k	

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Issue RoOD to Programme Co-Ordinator for approval process		
Added to RoOD tracker and upload documents to Verto	LR Action	
Publication	LR Action	
Sign-off Consultation (to all stakeholders)	PM Action - Ensure fluid communication both internally and externally.	

3. Delivery

Checklist	Information	Completion Date
Pre-Start Meeting (if Required)	Please Use Pre Start Meeting Template	
Confirm relevant contracts in place between parties	<ul style="list-style-type: none"> Regardless of the project type, a project will have a formal contract in place between the client and supplier If any issues occur on-site, it is imperative there is a contractual relationship between the two parties. This safeguards from poor workmanship and other disputes. What is the proposed contract? MoB / T&C's/ JCT / NEC 	
<i>Update Delivery Dates on Verto</i>	<i>Update your Verto Programme following Pre-start meeting with exact delivery dates</i>	
Contractor Risk Assessments & Method Statements (RAMS)	<ul style="list-style-type: none"> You must have received a copy of the contractors RAMS prior to commencing on-site On larger projects a further request will be made for a H&S file 	
Risk Matrix Evaluation	Using the Matrix – give your project a score on Verto with relevant commentary	
Site Visits – Delivery Management	Decide from the outset your delivery management site visit frequency. You need to ensure the contractor is doing what is programmed and make quality inspections	
Arrange Stage Payments	<ul style="list-style-type: none"> Arrange payments as agreed. Payments can only be made based on invoice receipt and approval by PM. Please ensure a payment log is created. Contact LR if any queries on the process 	

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Stakeholder Engagement	Send progress Update email with photos for internal / external stakeholders	
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4. Handover & Project Closure

Checklist	Information	Completion Date
Budget Spent (Zero Confirmation)	Check finance reports to ensure spend made.	
Update Verto / Programme Information	Make relevant updates to Verto including Programme Information	
Upload O&M / relevant documents	Make request from contractor for any applicable O&M manuals or H&S file.	
PMO Comms Completion	Please use PMO Comms Template	
Comms issued to Programme Manager	Issue to Programme Manager for Approval	
Project moved to delivered tab	LR Action – PM to advise LR	
Project Review (Within Delivery Team Meetings)	Advise of completion within Delivery Team Meetings	
Final Comms / Stakeholder Engagement	Final email confirming completion of the project and closure	