

## Prepare documentation for handover and obtain project feedback

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### Overview

This standard is about monitoring that project requirements have been achieved. This involves monitoring final inspections and tests for certification purposes, confirming and addressing any stakeholder concerns, recording actions and ensuring that equipment, services and operational documentation are handed over in accordance with the contract. It is also about assessing project feedback and identifying and reviewing improvements against the original project objectives

This standard is for people working in the occupational area of site inspection and can be used by technicians, supervisors and managers.

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## Performance criteria

You must be able to:

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- P1 review **project requirements**, consult with stakeholders and monitor a commissioning programme
- P2 demonstrate that **project requirements** have been met and record outstanding work and non-compliant items
- P3 monitor commissioning inspections and tests that require certification and ensure that they are witnessed by **stakeholders** as required
- P4 identify and record any outstanding works
- P5 confirm any **stakeholder** concerns that need to be addressed at project handover and record any required actions
- P6 record relevant **information** produced during design, construction and installation, which can be used for operation and maintenance in accordance with the contract

### Obtain and communicate project feedback

- P7 obtain, investigate and assess **feedback information**
- P8 identify and record feedback and confirm areas to focus on for making **possible improvements**
- P9 review and communicate the **feedback information**, match it against the original requirements and objectives and summarise both positive and negative factors

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### Knowledge and understanding

You need to know and understand:

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- K1 what to identify and record as outstanding works (understanding)
- K2 how to review **project requirements** and consult with **stakeholders** (application)
- K3 how to demonstrate that **project requirements** have been met and record outstanding work and non-compliant methods (application)
- K4 how and why to review a commissioning programme (application)
- K5 how and why to monitor a commissioning programme (analysis)
- K6 how and why to monitor commissioning inspections and tests that require certification and ensure they are witnessed by **stakeholders** as required (analysis)
- K7 how to confirm any **stakeholder** concerns that need to be addressed at project handover and record any required actions (application)
- K8 how to record the most relevant **information** produced during design, construction and installation, which can be used for operation and maintenance in accordance with the contract (application)

#### Obtain and communicate project feedback

- K9 what **feedback** to identify and record to confirm the areas to focus on for making possible **improvements** (understanding)
- K10 how to obtain **feedback information** (application)
- K11 how to summarise both positive and negative factors from the **feedback information** (application)
- K12 how and why to match **feedback information** against the original requirements and objectives (synthesis)
- K13 how and why to review the **feedback information** (analysis)
- K14 how and why to investigate and assess **feedback information** (analysis)
- K15 how to communicate the **feedback information** (application)

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## Scope/range

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### 1 Project requirements:

- 1.1 time
- 1.2 quality
- 1.3 cost
- 1.4 health and safety
- 1.5 regulations
- 1.6 sustainability
- 1.7 defects rectification period

### 2 Stakeholders:

- 2.1 clients
- 2.2 users
- 2.3 consultants
- 2.4 contractors
- 2.5 regulating authorities
- 2.6 manufacturers

### 3 Information:

- 3.1 record drawings
- 3.2 schedules
- 3.3 specifications
- 3.4 contract records
- 3.5 photographs
- 3.6 trade literature
- 3.7 statutory consents
- 3.8 commissioning and test certificates
- 3.9 operating instructions and performance ratings
- 3.10 guarantees
- 3.11 warranties
- 3.12 Health and Safety File

## **Obtain and communicate project feedback**

### **4 Possible improvements** from feedback

- 4.1 working arrangements
- 4.2 formal and informal communications
- 4.3 quality control
- 4.4 design, technical and operational appraisal
- 4.5 benchmarking and post project review

### **5 Feedback information:**

- 5.1 approved providers
- 5.2 project documentation
- 5.3 organisational documentation
- 5.4 standard details and specifications
- 5.5 product information
- 5.6 government and statutory publications

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