**Contract Management Checklist** 

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| --- | --- | --- | --- |
| **Activity** | **Complete? (yes/no)** | **Date** | **Guidance documents/comments** |
| **INITIATION STAGE** |  |  |  |
| Classify contract using assessment tool |  |  | Value risk matrix |
| Ensure contract is signed and on your internal contract register |  |  | According to your internal process |
| Collate key contract documents into filing structure |  |  | Using agreed format for filing structure |
| Confirm communication approach and content to customers |  |  | Approve content of standard letters etc |
| Inform & communicate to your staff/teams as appropriate |  |  | Inform all staff that are affected by the new contract |
| Confirm Insurance cover in place and appropriate |  |  | Confirm requirements from contract documentation, and internal requirements |
| Complete required health and safety documentation associated with the contract |  |  | Internal H&S policies and procedures and external requirements eg. CDM, F10s etc. |
| Determine contractor reporting arrangements and frequency |  |  | As per internal requirements |
| Confirm credentials and qualification of operatives |  |  | DBS checks, accreditation certificates etc. |
| Prepare access to Asbestos Register (if applicable) |  |  |  |
| Raise order internally as per your requirements |  |  |  |
| Pre-contract meeting |  |  | SEC attendance if desired, pre-start meeting agenda |
| Obtain supplier contact details and responsibilities |  |  |  |
| *Insert any more that are applicable to your contract* |  |  |  |
| **MANAGEMENT STAGE** |  |  |  |
| Regular review of progress against plan |  |  |  |
| Contract administration, including valuations, payments, invoicing, variations |  |  |  |
| Quality control – site visits, audits |  |  |  |
| Monthly contract meetings organised |  |  |  |
| 12 month review (if applicable, depending on length of contract) |  |  | SEC can attend if desired, 12 month review meeting agenda |
| *Insert any more that are applicable to your contract* |  |  |  |
| **COMPLETION STAGE** |  |  |  |
| Receipt of warranties, O+M manuals, certificates and any other documentation required for this stage |  |  |  |
| Final inspections quality checks |  |  |  |
| Final payment process |  |  |  |
| Final communications |  |  |  |
| *Insert any more that are applicable to your contract* |  |  |  |