|  |
| --- |
| **STAGE 6** |
| Handover |

|  |  |
| --- | --- |
| **Job no** |  |
|  | |
| **Job Title** |  |
|  | |
| **Team members** |  |
|  | |

**© RIBA Publishing 2021**

This document may be downloaded, stored, modified and distributed by the downloader in pursuance of the downloader's architectural business requirements, namely for the purposes of creating project plans and managing those projects. For full details, please refer to the Licence Agreement published on [architecture.com/SPH](http://www.ribabookshops.com/jobbook)

**Instruction for use**

This checklist is an rtf (rich text format) form, optimised for editing in Microsoft Office Word. Parts of it have been temporarily locked to preserve the default wording found in the *RIBA Job Book* (Tenth Edition). The parts that are not locked are the check boxes, the ‘notes’ fields and the ‘completed on’ fields. In other words, it is possible to add your own text and subsequently edit these fields.

It is recognised that the default wording, which is currently locked, may need to be added to and edited. To unlock it, please follow the instructions below:

**Microsoft Office Word 2003**

* Select *View>Toolbars>Forms* from the main menu. The *Forms* toolbar will appear.
* Click the *Protect Form* button  to unlock the checklist. To lock it again, click it again.
* If needed, click the *Form Field Shading* button  to hide the grey shading that appears around the editable fields. To show it again, click it again.

**Microsoft Office Word 2007**

* Click the Office button  to bring up a menu. Select *Word Options* from the bottom of the menu.
* The *Word Options* dialog window will open. Select the *Show Developer Tab* option. At the bottom of the window, click *OK*.
* A new *Show Developer* tab appears at the top of your screen. Click on it.
* In the *Protect* group, select *Protect document*. A window will appear on the right-hand side of your screen.
* In this window, select *Stop protection* from the bottom of the list.

**Microsoft Office Word 2010**

* Click the *File* tab to bring up a menu. Select *Word Options* from the bottom of the menu.
* The *Word Options* dialog window will open. Select the *Customize Ribbon* option.
* Select *Developer* box in the right hand side menu and click OK on the bottom of the screen.
* A new *Show Developer* tab appears at the top of your screen. Click on it.
* In the *Protect* group, select *Restrict Editing*. A window will appear on the right-hand side of your screen.
* In this window, select *Stop protection* from the bottom of the list.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | DLP Activities |  | |  |
|  |  |  | |  |
| 1. | Conclude administration of the building contract, including the three-, six- or 12-month defects inspection as applicable.  *Enter notes here* | Completed on | |  |
|  |  |  | |  |
|  |  |  | |  |
| 2. | There will be a prescribed programme for DL P activities after practical completion, usually for six or 12 months. A programme for activities for soft landings and POE will need to be agreed with the client during an earlier stage, ideally in Stage 1.  *Enter notes here* | Completed on | |  |
|  |  |  | |  |
|  |  |  | |  |
| 3. | On practical completion remind the client that responsibility for insurance reverts to them.  Enter notes here | Completed on | |  |
|  |  |  | |  |
|  |  |  | |  |
| 4. | Conduct in-house appraisal of office performance on the project.  *Enter notes here* |  |
|  |  |  | |  |
| 5. | Consider holding a debriefing exercise with the client and other consultants.  *Enter notes here* | Completed on | |  |
|  |  |  | |  |
| 6. | Check if the building log book for the building operator – required by Part L of the Building Regulations – has been issued. The building log book should be in accordance with the requirements of CIBSE TM 31 (refer to [www.cibse.org](http://www.cibse.org)).    Enter notes here | Completed on | |  |
|  |  |  | |  |
| 7. | Participate in the creation of operating manuals for the building. See ‘Handover Information  and O&M Manuals’ (BG 79/2020) for recommended contents of these manuals  (refer to [www.bsria.com](http://www.bsria.com)).  Enter notes here | Completed on | |  |
|  |  |  | |  |
|  | POE Activities |  | |  |
|  |  |  | |  |
| 1. | Advise the client of the need to employ other consultants and the contractor.  Enter notes here | Completed on | |  |
|  |  |  | |  |
| 2. | If a full feedback study is planned, agree with the client what access will be available, what the timescale should be and in what form the findings should be presented.  Enter notes here | Completed on | |  |
|  |  |  | |  |
| 3. | Explain to the client the purpose of a debriefing exercise or full post-project evaluation  and that their feedback might be a key part of this activity. Discuss to what extent key  persons in the organisation could be expected to contribute opinions at a meeting chaired by the architect.  Enter notes here | Completed on | |  |
|  |  |  | |  |
| 4. | Arrange a meeting with key personnel from the client organisation (the building users and  maintenance staff). Ensure that you have considered your objectives and what information you want to get from this exercise and have a clear agenda for the meeting.  Enter notes here | Completed on | |  |
|  |  |  | |  |
| 5. | Discuss with the client to what extent the managers and users of the project could be expected to cooperate in completing a questionnaire.  Enter notes here | Completed on | |  |
|  |  |  | |  |
| 6. | Discuss with the client whether authorised photographers would be allowed access after  final completion, for feedback purposes.  Enter notes here | Completed on | |  |
|  |  |  | |  |
| 7. | Discuss with the client whether it would be permissible for the architect to carry out a survey of the building in use sometime after completion.  Enter notes here | Completed on | |  |
|  |  |  | |  |
| 8. | Check with your PI insurers that you have cover for feedback activities.  Enter notes here | Completed on | |  |
|  |  |  | |  |
| 9. | Consider the desirability of a full feedback study or a post-project evaluation.  Enter notes here | Completed on | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 10. | Year 1:  • Recalculate capital and revenue target costs at current rates.  • Identify the actual capital costs.  Year 2 (and 3):  • Identify/provide data required for the review.  • Agree a programme of meetings.  • Identify the issues, establish causes and consider remedies.  • Contribute to the output reports and recommendations.  • If instructed, implement the recommendations.  Enter notes here | Completed on |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 11. | Participate in the BREEAM in-use assessment process if required.  Enter notes here | Completed on |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 12. | Seek approvals as required by the building occupier to undertake post-occupancy tests.  Enter notes here | Completed on |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 13. | Keep records of time costs for POE activities.  Enter notes here | Completed on |  |