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Project handing over letter format

Site handovers often involve many moving pieces, and can elicit very different emotions and reactions based on how smoothly the site handover goes. Site handovers introduce new complexity to a project, as the status quo and normal operations which have been running smoothly (hopefully) for weeks, month or even years stop - and a new normal takes its place. During the site handover process, many issues can arise, so it's massively important that clients, contractors and other participating parties communicate effectively during this period in order to smooth the transition. A site handover letter is one of the tools which clients, contractors and subcontractors use to shift the onus of the project and the site to another party, after their work is deemed complete. A site handover letter can simply serve as the confirmation of a site handover, or it can include more detail which helps the new site owner or operator understand what has been handed over, and what hasn't. Not all site handover letters look the same. Site handover letters to clients and contractors will look different, as will site handovers on different projects. But maintaining a standardised site handover letter which you can use as a template for all of your different sites and projects is really helpful. This template can serve as your general site handover framework, and you can easily adjust and modify pieces of it to suit different projects. You want your site handover process to be neat and professional, and you want your site handovers to be as clear and concise as possible, so that you don't run into issues and disputes later down the line. You'll see the handover letter to client below contains these elements. It covers the required information, and provides some important additional details which parties need to be aware of - and need to be able to reference. The below site handover letter also resembles a full project handover - and the two often go hand-in-hand of course. Company Name Address Contract Name Contract Number RE: SITE HANDOVER I am writing with respect to [Insert project or site name] to confirm the Handover Date and occupancy of [Insert site/building etc.] effective [Insert date] as discussed with your team. This letter will serve as our confirmation and your agreement of various aspects respecting the handover. Please review and if you are in agreement with the content, please sign, date and return the signed letter to [Insert responsible person name], at the above address. Insurance information: Warranties: Manuals and record drawings: Completion of prime responsibilities: Operations and maintenance of building site: Disposition of surplus equipment and materials Presence of staff on site: We are pleased to hand over this facility to [Insert company name], and appreciate the on-going support and assistance from you and your staff. Should you have any questions with respect to the above, please contact [Insert name] on [Insert phone number]. Signed by, Authorised Person So we know that the site handover letter to clients, and the site handover letters to contractors are important communication pieces during any site handover. But outside of communicating a site handover, what can a client or contractor do to ensure that the site handover goes to plan. One really helpful document for this is a site or project handover checklist. Instead of scrambling to get everything together, a checklist enables a company to comb through the elements of the site handover which they need to cover. This checklist (as you can see below), should cover all of the elements of a site or project handover, including files, licenses, insurances and access and defect arrangements. The problem with most failed handovers is that something was missed or forgotten. A good checklist ensures that nothing gets missed or forgotten, and that both parties have performed their duties during the site handover. On most sites, the site handover is a small part of the overall length of the project. The site handover is the conclusion and culmination of all of those weeks, months or years of work. But most of the site handover hard work occurs during the project of course. Staying on track for the site handover can be really hard work - because staying on track means delivering on time and on budget. One of the areas in which we (Sitemate) have seen companies really improve in their ability to stay on track for site handovers is by properly organising their project information during the project delivery phase. And what does properly organised information look like? Well, construction and other site-based companies often spend hours and hours just reconciling the information which has been collected during the project. This means that the site handover process often involves a mad scramble and a bunch of end-of-project headaches in the form of delays, defects and other issues. Organising your project information properly from the outset - with a dedicated system like Dashpivot - ensures that you head into a site handover with all of your ducks in a row. You can store, access and share any of the photos or site documents captured during any part of project delivery from a single place. Exporting critical handover forms, photos and documents takes seconds not hours, and all of your records are reliable and professional. At the start of a project, creating standardised and efficient processes can seem lot a lot of work, especially with a large project right around the corner. But once you have started the project, and once your supervisors, engineers and project managers are stuck into the day-to-day work of project delivery, it can be impossible to improve the processes you started with on day one. Projects can get away from you, and by the time that the site handover arrives, you are in no position to handover a good and well documented site to a client or contractor. Your site handover letter to your client, or site handover letter to your contractor needs to be thorough and professional, but the best way to supplement a site handover letter is with a well organised and well delivered project - which often takes more than a single letter. A recent study from our Research Fund identified four broad categories with three recommendations that emerge as factors that have been in place on multiple projects that have handed over successfully from transition to business-as-usual. As such these should be considered lessons learned and fall into the category of 'if you only do three things' in each section: 1. Requirements should be written into tender documentation/contracts in as much detail and as specifically as possible including engagement requirements, data environment and any standardisation of equipment or product that the client requires. 2. Whole life cost must be considered if at all possible. Does spending more now have an impact on the overall operating cost of the project throughout its life? 3. Incentivise success. If a scheme is well delivered, this should reward all parties. 4. Handover is a process not a date. Planning for it should be from the start of the project and it should be viewed as an incremental transfer of knowledge and operation from project team to business-as-usual. 5. The benefits and deliverables must be measurable and communicable from the start. Ask why are we doing this project and how will we know when it is done? 6. Involve end users from the outset. Through stakeholder analysis, understand who will benefit from the project, who will be required to facilitate the delivery of the benefits and how the project outputs will impact their role. 7. Documentation must be written for the end users. It may require different sets of documentation for different users but for documentation to support knowledge transfer it needs to be meaningful, applicable and relevant to the end users. 8. Collate lessons learned as the project progresses. It provides more meaningful data for future projects, it can be tied to stage gateways or key deliverables. 9. Agree the information requirements at the outset. This ensures all parties have a clear deliverable, know what is expected of them and work towards achieving the goal from the start of project. 10. Often overlooked but put simply get good people on your project and keep them for as long as you are able. 11. Definition of stakeholders should be carried out throughout and in detail. Who will be impacted by the project and who is needed to make it a success? 12. The client role is pivotal including client engagement. Posted in Preparing for BAU Managing delivery Sign up to the APM Newsletter. Handover report samples refer to a document submitted by a staff member of a company who is about to transfer his position to another employee, either permanently or temporarily. The handover report helps the successor to understand his duties in the new position. 218+ FREE REPORT Templates - Download Now Adobe PDF, Microsoft Word (DOC), Microsoft Excel (XLS), Adobe Photoshop (PSD), Google Docs, Apple (MAC) Pages, Google Sheets (SPREADSHEETS), Apple Numbers, Microsoft Publisher, Adobe Illustrator (AI) 562+ Sample Report Templates33+ Business Report TemplatesAre you about to resign from your company or are you planning on taking a long leave? Well, then you would have to offer a handover report to the successor colleague who would be carrying your duties in your absence. 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