Project Management

Section Six: Turnover Process
Performance Objectives

1. Define turnover
2. Implement steps necessary for smooth turnover
3. Use a checklist to facilitate a turnover meeting for a new project
4. Ask your management to explain any important information about the project that is not documented in the contract
Turnover Readiness

Turnover is a handoff process that involves the transfer of information from those who sold the job to those who will build the job.

What is the purpose behind a smooth turnover?
Elements of a Turnover

The following is a “laundry list” of categories or elements to consider as you create or modify your own list for a particular project.

- Job Status
- Safety
- Internal Hazards
- Contracts
- Drawings and Procedures
- QA/QC
- Shop Work
- Field Fabrication
- Construction
- Labor
- Staffing
- Invoicing
- Subcontractors
- Miscellaneous
- Review of Estimate
Organization and Staffing

- Positions identified
- Positions filled by name
- Release dates confirmed
- Train organization/expectations
Safety and Security

- Site safety plan
- Training & orientation
- PPE requirements
- First-aid facilities
- Safety incentive program
- Site security
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Safety Check

Refer to Appendix 6.1
Turnover Checklist

For the turnover meeting, which of the topics in the Turnover Checklist would be most important...
- to you?
- to your company?
- to the customer?
- to the project?
This is similar to what a military Quartermaster does. You’ve heard how an army marches on its stomach. Jobs get built with the materials made available. If you don’t have the right stuff, the wrong stuff will be used!
For the purpose of the turnover meeting, we need to have an understanding of the contract plan, what national and local contracts applied, whether we need to contractually address performance incentives, and if we need to do a scope review. Your turnover process needs to be structured to give adequate time to properly address these points.
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A change order is any change to the scope of work described in the contract or contract documents. Project Managers are ultimately accountable for all changes to the work; both technically and financially. Change orders will be addressed in greater detail later in this course.
Scope optimization is a clear understanding of where the contractual scope of work ends and maintenance scope begins (or vice versa). In many situations, it may be “optimal” to combine maintenance scope with contractual scope, i.e., in the event of a need to tie in the new work to the old.
Before we can do the work, you have to establish safe working conditions.

Safety/environmental reviews: Any unique site conditions as it pertains to environmental impact, e.g., spill control or safety (see Section 8).

Procedure status: What procedures do we need, which are being developed, and what procedures have been approved?

Operator training: What operator training is required, what documents are needed to verify training (the training required for this specific job).

HAZOPS/HAZMATS: Has a HAZOPS report been completed and reviewed and signed off by site safety? Do you have all the Material Safety Data Sheets? Where are they filed? What is the process for managing new hazardous materials when they come on site?
Lightning Round

Assume that you’ve completed the turnover process from those who sold the job.

Now what should YOU do with the information?

Refer to Appendix 6.2 Project Information Handbook
Case Study

Refer to Appendix 6.3 Case Study

Individually, identify the information that is necessary in order for you to start this project. What are the questions you will need to ask of the Construction Manager in order to gather this information?

Present your response to the entire class
Summary

- Define turnover
- Implement steps necessary for smooth turnover
- Use a checklist to facilitate a turnover meeting for a new project
- Ask your management to explain any important information about the project that is not documented in the contract
Lessons Learned

Take five minutes to complete the material for this section in the Lessons Learned Log.