**Purpose**

The purpose of this Checklist is to aid the Project Manager in ensuring that the Project Execution Plan (PEP) is suitably developed for the construction project.

**Information required within the Project Execution Plan (PEP)**

A typical Project Execution Plan (PEP) will include the following:

| **Project Execution Plan – Information Checklist** | | | |
| --- | --- | --- | --- |
| **Project No.:** Click here to enter text. | | | |
| **Project Title:** Click here to enter text. | | | |
| **Item No.** | **Information** | **Relevant** | **Completed** |
| **1.** | **Project Description**  *Note:*  *Summarised from the Strategic Brief and Initial Project Brief documents.* |  |  |
| 1.1 | The client’s design requirements |  |  |
| 1.2 | An outline of the key Project Brief elements |  |  |
| 1.3 | Any statutory and site-specific constraints |  |  |
| 1.4 | An overview of the Sustainability Strategy |  |  |
| 1.5 | Procedures for controlling and reviewing the Project Brief and the Project Execution Plan (PEP) |  |  |
| 1.6 | Summary of any significant risks |  |  |
| **2.** | **Project Organisation**  *Note:*  *Summarised from the Strategic Brief and Initial Project Brief documents.* |  |  |
| 2.1 | The identity of the client representative |  |  |
| 2.2 | The identity of any key stakeholders |  |  |
| 2.3 | Agreed procedures for consultation and approval |  |  |
| 2.4 | Project team members and their defined responsibilities and contact details |  |  |
| 2.5 | Summary of procurement approach |  |  |
| **3.** | **Project Controls** |  |  |
| 3.1 | The Design Responsibility Matrix |  |  |
| 3.2 | Summary of Communication Strategy (with full Strategy annexed to the PEP) |  |  |
| 3.3 | Summary of Technology Strategy (with full Strategy annexed to the PEP) |  |  |
| 3.4 | Information Exchanges – outline information required to communicate ideas |  |  |
| 3.5 | The Project Programme |  |  |
| **4.** | **Project Development**  *Note:*  *Reference only. Typically added at Project Stage 2 (Concept Design).* |  |  |
| 4.1 | Additional design management procedures |  |  |
| 4.2 | The Health and Safety Strategy |  |  |
| 4.3 | The Maintenance and Operational Strategy |  |  |
| 4.4 | The Construction Strategy |  |  |
| **5.** | **Change Control**  *Note:*  *Typically added at Project Stage 3 (Developed Design to monitor and control changes to the Final Project Brief, which is an output of Project Stage 2 (Concept Design).* |  |  |
| 5.1 | Project definition of ‘Change’ |  |  |
| 5.2 | Agreed Change Control Procedure for amendments to the Final Project Brief and for amendments to approved designs |  |  |
| **6.** | **In-Use Processes**  *Note:*  *Developed with Information from the Handover and Maintenance and Operational Strategies.* |  |  |
| 6.1 | Scope for Feedback |  |  |
| 6.2 | Review of any Post-Occupancy Evaluation |  |  |
| 6.3 | Review of Project Performance |  |  |
| 6.4 | Success of Project Outcomes |  |  |
| 6.5 | Areas for further Research and Development |  |  |
| 6.6 | Summary of ‘As-Constructed’ Information |  |  |