

## Maryhill Contract Management Framework

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## What is a Contract Management Framework?

A step by step guide for staff on how to manage a contract, or any arrangement where we buy in goods or services from elsewhere.

### Why do we need a contract management framework?

We spend approximately 60% of our money each year on external contracts (not including new build schemes), and until this framework was developed we didn't have any guidance for staff on how to manage them well.

This lack of guidance meant that the Association was exposed to risk, e.g. of poor performance not being managed or of paying more than we should. It also made things difficult for staff managing contracts because they weren't clear what to do. This framework aims to address these issues.

### How should you use it?

When the guide talks about a contract, it doesn't mean that it only applies where a formal contract is in place. It means any arrangement where services are being provided.

This guide aims to set out principles that can apply to any arrangement where we buy something in from elsewhere, regardless of whether we are managing a multi-million pound reactive repair contract or an arrangement for window cleaning for £20 a week.

This guide is written for contract managers, or the lead person responsible for managing a contract or a service. **You need to read this framework, understand it (or ask for help if you don't), and follow it.**

The framework is split into sections so you can dip in and out depending on where you are with your contract and the challenges you may be facing.

This framework has been developed collectively by contract managers from across the Association. If, however, you think it could be improved please let any of the below contract champions know.

### What do you if you aren't sure?

If you aren't sure about any aspect of managing a contract you can ask one of our contract management champions:

Alistair McArthur – Head of Development

Bryony Willett – CEO

Rebecca Wilson – Director of Resources

## **Understanding your contract**

If you are the person responsible for managing a contract it is essential that you understand how it is meant to work. These are the key things you need to know:

- **Who are the key contacts in the service provider (e.g. the people delivering on the ground and the people who can make the decisions or address issues)**
- **What services you can expect and what standards you can expect (in a formal contract this will be the terms of the contract or the specification)**
- **When you can expect the services and how long you can expect them for (e.g. frequency and contract duration)**
- **How much you are expecting to pay for the services, when you are expected to pay, and how this might change, e.g. will it increase each year.**
- **What to do if the contract isn't working well – e.g. what are the escalation routes or performance management tools, e.g. formal review meetings or financial penalties. In a formal contract this will be in the contract terms.**
- **What your responsibilities as a client are, e.g. do you have to provide the contractor with certain information, do you need to pay within a certain period.**
- **What to do if you want to change the way services are provided. In a formal contract this will be in the contract terms.**
- **Who else in the Association is involved in the contract? Are you able to take key decisions or do you need to involve/inform others?**
- **Does this contract directly impact on customers, and if so how will you ensure customers and CCT are kept informed?**

These things should all be written down at the start of the contract and as contract manager you should know where they can be located.

As contract manager you should be able to answer questions about any of the above

If you are managing a contract that you didn't set up, and can't find the documentation about the contract, it is now your job as contract manager to retrospectively find it – this might mean asking the service provider.

## Procuring your contract

This framework does not tell you how to procure your contract. This information can be found in our [procurement toolkit](#).

However, effective procurement is vital for effective contract management.

If you don't clearly set out the expectations of a contract it can be very difficult to manage this contract when things go wrong.

When you are procuring a contract you need to write a specification. This can be a complex contractual document containing terms and conditions, schedule of services etc., or it might be as simple as an email or a briefing document. The detail of the specification will generally relate to the value of the contract, or the risks involved, e.g. a contract to carry out health and safety checks will have a very detailed specification.

All specifications should include the following information as a minimum:

- A description of the services, in as much detail as possible
- When the services need to be provided and how long for
- How the services will be paid for, e.g. after each job, every month
- Any increase in the amount paid, e.g. an annual percentage increase
- Quality standards, e.g. any performance targets or minimum criteria required for acceptance of products or services
- Set out any legal, health & safety, insurance cover or licencing conditions required to be met by the service provider
- Any contract extension period which might apply and on what terms
- How the service arrangement can be terminated, e.g. notice periods
- The answers to as many 'what if' questions as possible, e.g. what happens if the services are late, or are delivered to a poor standard, or if Maryhill as client wants to change the services

## **Contract administration and documentation/record keeping**

### **Key contract documentation**

It is essential that records are kept of the following information about a contract:

- **Contract or letter of appointment.** This could be an email for smaller/simpler contracts or services.
- **The scope of service or specification.** This will normally be the tender documentation. For smaller contracts this could be included in an email.
- **Cost and how payments will be made** (e.g. at the end of the project, monthly, in arrears, in advance etc.). Again, for smaller contracts this could be included in an email.
- **Programme of works** – what will be delivered and when
- **Health and safety information** (if appropriate, e.g. training records of staff, detail of the Association's asbestos records sent to contractor)
- **Contractor's insurance documentation**
- **Minutes of meetings/correspondence**
- **Variations** – any changes to the contract scope
- **Community benefits**
- **Key contact details** (contract directory) at both the contractor and Maryhill

For major property contracts the following will also be required:

- Contractor appraisal/lessons learnt
- Handover procedures
- CDM requirements - Pre-start Health and Safety Construction Information (client) and Construction Phase Health and Safety Plan (contractor)
- Health and Safety File/Operation Manual (at contract completion)
- Monitoring document, e.g. completion records
- Statutory approvals, e.g. planning and building control
- Valuations for partial payments
- Post completion defects management processes and records

At the moment we do not have a standard Association-wide filing system for contracts across the Association. We are hoping to develop this during 2019/20. So for the moment please ensure that records are stored logically where others can access them, and ensure that the filing system is consistent if you manage a number of contracts – e.g. all of our cyclical contracts follow the same filing system.

## **Effective minute taking**

It is vital that effective written records are kept of pre-start and other progress meetings.

Pre-start meetings should always have a formal minute. For larger ongoing contracts, such as our reactive repair contracts, it will also be appropriate to formally minute regular progress meetings. For smaller scale or shorter duration contracts it may be sufficient to send an email with key points.

Whichever method is used the following key things should be included.

- **Who attended the meeting**
- **What has been agreed**
- **What actions have individuals agreed to take and when have they agreed to complete them by**
- **Any contractual details, e.g. formal warnings issued and what will happen if improvements are not delivered**

Notes should always be taken by Maryhill as client or our employers' agent.

Notes/minutes should be issued a maximum of one week after a meeting.

Notes/minutes should be issued with the statement 'draft notes/minutes attached. If no comments are received within the next two weeks Maryhill will assume these are an accurate record of the meeting'.

Minutes from regular progress meetings should be issued with an action tracker. This makes it clear how long actions have been outstanding for.

An example minute from a regular progress meeting can be found at appendix 1 [here](#).

An example agenda for a regular progress meeting can be found at appendix 2 [here](#).

## Pre-start meetings

Every new contract should start with a pre-start meeting. This is your opportunity to get the contract off to a good start and ensure everyone is clear about the expectations of the contract.

This should be held face to face in our offices if at all possible.

Pre-start meetings should always be minuted by the Association or the Association's agent.

Pre-start meetings need to be attended by people on the client (Maryhill) and contractor side who can make decisions. This may mean that senior staff attend pre-start meetings but not later progress meetings unless there is an issue. Pre-start meetings should also be attended by the people delivering the service and managing the contract on the ground.

Other parties who you might want to invite:

- Finance
- Health and safety lead (if relevant)
- Employer's agent (if relevant)
- Designers (if relevant)
- Housing management (e.g. patch housing officer)
- Clerk of works (if relevant)

This is a list of all of the things that should be covered at a pre start meeting.

Essential items:

- Directory of key contacts on client and contractor side for the contract
- Confirming what services are to be expected (e.g. detailed specification, location of works, contract terms and conditions)
- Confirming processes (e.g. access to properties, key people to speak to)
- Confirming when services will be delivered (e.g. contract start date and length, programme and key milestones)
- Invoicing and payments and confirming contract value
- Frequency and agendas of any ongoing meetings

Other items that you may want to cover if relevant:

- Development of IT interfaces and testing of this.
- How data will be securely shared and processed – e.g. tenants' contact details
- Health and safety responsibilities and information, e.g. CDM, asbestos records
- Any signing of documents, e.g. contracts
- Any documents not provided at tender, e.g. training records of individual staff
- Communication protocols with customers (and advise CCT of this)
- Communication with the wider world, e.g. press releases, social media posts
- Quality control and how this will work, e.g. clerk of works
- Contract change procedures
- Contract key performance indicators (if not set out in the tender)
- Community benefits

## Relationship Management

The best way to manage a contract is to build up an effective relationship with the contractor. Key ingredients to an effective relationship are:

- **Good and frequent communication.** For longer term and high value contracts there should be regular face to face meetings
- **Early warning of issues,** e.g. staff absences on either side, delays, supply chain issues
- **Be honest** with the contractor if they aren't performing and about our own client side service, e.g. if we have been giving the contractor poor information own up and fix it. Don't try to ignore it or cover it up.
- **Build up trust** by following through on commitments. This goes for Maryhill as client as well as the contractor.
- **Ensuring clarity of roles and expectations** – and keeping and issuing clear written records.
- **Professional approach that isn't too cosy!** It is not your job as contract manager to make excuses for the contractor or to make their performance look better than it actually is. It is your job to ensure they are delivering in line with the contract.
- **Publicly recognising a job well done,** e.g. in regular review meetings or thanking contractor on social media who have gone the extra mile for our customers.
- **Collaborating to solve problems.** Invite ideas from contractors when you encounter a problem. They have lots of experience from elsewhere to bring to the table.
- **Knowing when to pick up the phone.** Aggressive emails are never productive and do not do the Association's reputation any good. Pick up the phone and try to resolve issues with your counterparts in the contractor.
- **Escalating appropriately.** If a contractor is not performing against a contract inform your manager and use the mechanisms in the contract. Don't get angry. Get contractual!

## Performance management

When managing a contractor's poor performance these are the key steps you should follow. You might find you have to go up and down these steps if performance improves then dips again during a contract.

- 1. Tell the contractor they are not performing in line with the contract.** Base performance concerns on robust evidence. Have you got performance results that are calculated in line with the contract? This might be only 80% of appointments kept in a big repairs contract or it might be as simple as consultants being late with their reports.
- 2. Check the contract/specification for steps to address poor performance.** In formal contracts it will set out what steps are to be taken when the contractor is not performing. You need to follow these to the letter to be able to rely on them later. You will need to keep a written timeline (audit trail) of events.
- 3. Raise the issue operationally but in writing** – e.g. at a progress meeting for a one off contract or at a monthly contract review meeting.
- 4. Set out expectations for the improvements you want to see and timeframes for these to be achieved.** Do this in writing. You may want to invite the contractor to produce their own improvement plan. Again be clear about times for this.
- 5. Escalate to your line manager and inform other parties as appropriate. If this is a major spend project finance need to be informed.** e.g. if this is externally funded you may need to inform your funders, if it a major contract you may need to inform the Board, if this is a new build scheme we need to inform DRS.
- 6. Tell the customer!** If this is affecting their experience of a contract – e.g. delays in a works programme make sure you tell the customer.
- 7. Managers/Directors – pick up the phone.** For major contracts your Director should have a relationship where they can pick up the phone to their counterpart in another organisation to try and get some traction.
- 8. Increase the frequency of meetings.** E.g. an ongoing contract you might want to move from monthly to fortnightly meetings. Ensure these are minuted. For a one off project you might want to meet again sooner than planned to ensure progress is being made.
- 9. Follow the contractual steps for poor performance. Always in writing.** This might involve penalties – e.g. our voids contract has a financial penalty for voids returned late, our reactive repairs contract has a financial penalty for missed appointments. Or, it might involve formal notices. If you are not managing a formal contract you will need to discuss with your manager what is reasonable in terms of waiting for improvement – such as two warnings then terminating the contract.
- 10. Flag risks of contractual default and start contingency planning.** For major contracts contractual failure would go into our strategic risk register. Contracts that involve an interface, e.g. reactive repairs, need a six month lead in to appoint an alternative. Ensure you have fully formed a plan to procure a new contract before you terminate an existing.

## Invoicing and payments

The key principles when managing payments to a contractor is that we pay:

- **the price that was set when the contract was agreed**
- **for work that is completed\***
- **for work that meets the agreed quality standards**

\*there may be exceptional times when payment is made upfront, e.g. some grant-funded projects

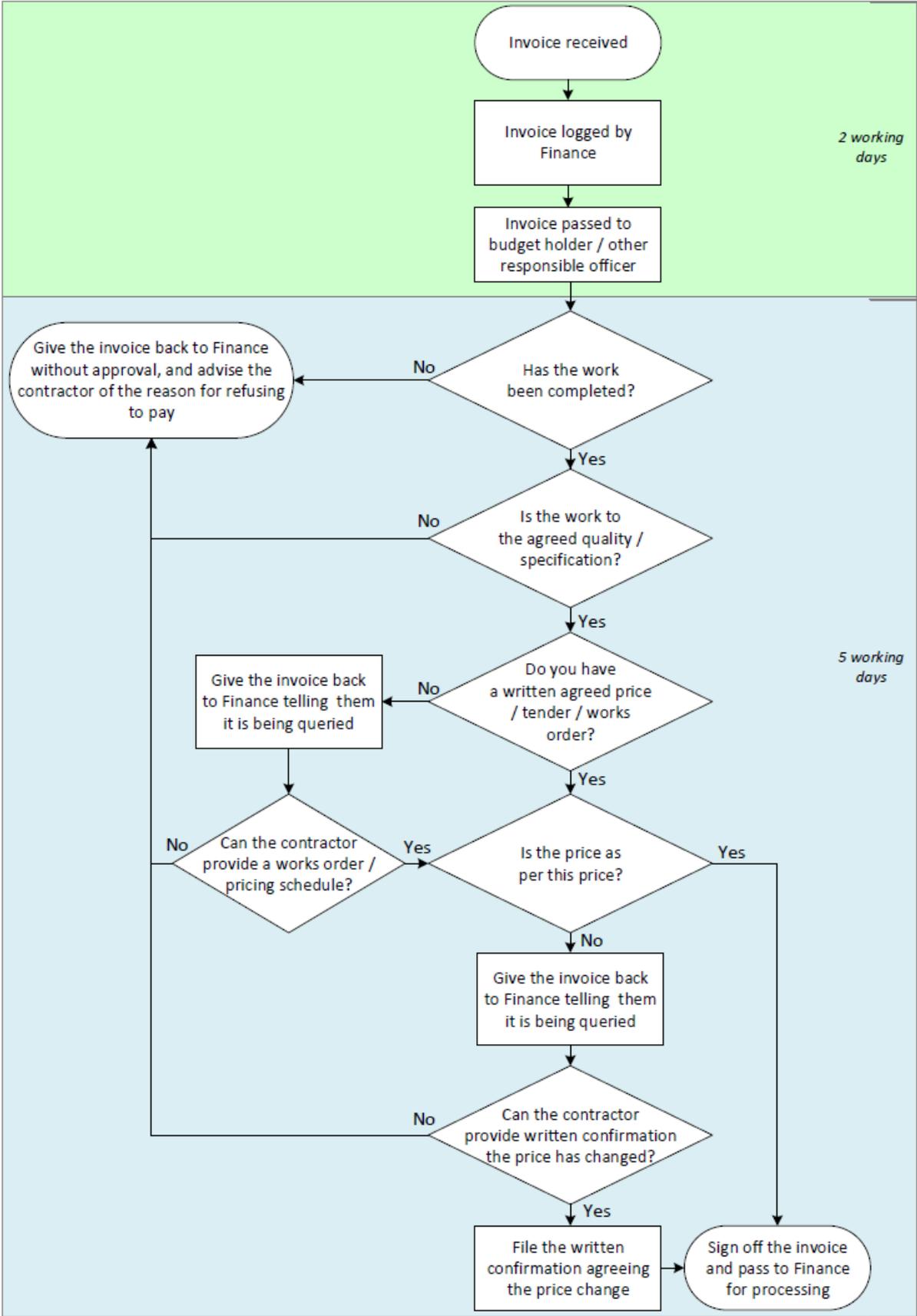
If any of the above are not met you should **not** pay the invoice.

If you do not have a written record of the price that was agreed prior to the works starting you should **not** approve the payment. As contract manager it is your job to check this.

Different contracts will have different processes built into them for making payments. As contract manager you need to understand these processes and follow them. They may detail how any queries around payments should be managed. If you do not follow them you risk legal action against the Association for unpaid bills.

Below is a generic flow chart for the process to follow when presented with an invoice from a contractor. The timeframes and details may vary between contracts but the principles should remain the same.

It is vital that you follow the process below to ensure the Association gets value for money for works and services.



## Dispute resolution

A dispute is a disagreement about the terms of the contract or whether one party is meeting these terms. Common reasons for contractual dispute are:

- Contractor delays
- 3<sup>rd</sup> party delays
- Changes in scope of services
- Disagreements about scope of work due to lack of clarity in specification
- Disagreements about valuations or payments
- Unknown costs
- Client not fulfilling their responsibilities

The list below sets out what to do in a dispute situation:

1. **Check the contract for the dispute resolution process.** In formal building contracts this will be set out. Follow this process and take legal or quantity surveying advice as appropriate. It is better to **take external advice now** rather than later.
2. **Highlight to your manager**
3. **Be clear** about the reason for the dispute in writing.
4. **Meet with the contractor and try to resolve.** Document the outcome of this meeting in writing with clear timescales and ownership. Set out next steps if timescales/outputs not delivered.

**If dispute is about the contractor's performance:**

5. **Serve formal warning** in line with the contract (if one in place) if outputs from the meeting are not delivered.
6. **Hold contractor to account in line with your warning.** E.g. if they haven't delivered what they were meant to do, escalate to the next steps of the dispute process. Document in writing all escalation steps.
7. **Start thinking about exit planning and early termination** – see sections below.

**If dispute is about disagreement in scope:**

5. **Consider appointing a mediator and meet again to try to resolve.** Document the outcome of the meeting and move forward if about to agree a compromise. Document any contractor changes. If a formal contract a legally drawn up contract addendum should be signed.
6. **Start the exit planning/early termination process** if a compromise cannot be reached – see sections below.

**If the dispute has been raised by the contractor about the Association:**

5. **Respond to the next steps from the contractor**, e.g. if they raise an adjudication notice. At this point you definitely need to take legal and/or professional advice.

## Exit planning

When planning to end a contract it is essential that you start thinking about this as early as possible. Below is a list of things you need to think about. The key to getting this right is planning it properly. For bigger contracts you should have a written exit plan and sign off items when they are resolved.

- 1. Procurement lead ins.** For contracts that have an interface with our housing management system. E.g. reactive repairs and gas, procurement needs to start a year ahead of a new contract commencing so you need to start exit planning before the end of the previous financial year. For most ongoing contracts, e.g. cyclical contracts, procurement should start six months before the contract expires. You should project plan out your procurement steps which will allow you to see when you need to start the process. If you are jointly procuring with another association double the procurement lead in times. It is guaranteed to take longer.
- 2. Contract extension.** Have you checked if you can extend the contract? This will be set out in the tender documentation or contract itself. You may complete a mid-term review to decide if you want to extend (following the format at [Appendix 3](#)). If you can extend the contract are the terms of the extension already set out or is there room to negotiate. If there is room to negotiate, you should be looking for a better deal in order to grant the extension – e.g. will the contractor freeze their rates, reduce turnaround times or give additional community benefits? Once you have agreed the deal for the extension you need to formalise this in writing with a contract addendum for larger contracts. This should be drafted by our legal or professional advisers.
- 3. Manage the risk of performance decline.** If contractors know they will not be providing the service in the future they may start to move resource off the contract/perform poorly. You need to be live to this risk and may want to step up performance monitoring.
- 4. Consult stakeholders** on how they think the contract has performed, any changes to specification required. Stakeholders would definitely include staff and customers and may include other third parties.
- 5. Records.** Ensure you have all of the records for the contract that you should have – e.g. details of all work carried out.
- 6. TUPE.** If this is an ongoing service, e.g. reactive repairs, staff in the existing service provider may have a TUPE right to the new contractor. You need to advise the potential incoming contractors of this as part of the tender documentation. You need to ask the current contractor if they have staff where TUPE would apply and provide (anonymised) details of them. This is a complex area; so if this applies to your contract, advise your manager and seek legal advice in advance on the details about what to provide in the tender documentation.
- 7. Defects.** In a works contract ensure you have clear written records of defects, whose responsibility it is to resolve and the process for management of this during the defects period. You also need to ensure there is a clear process for management of defects in the Association, e.g. are they logged on the system, who customers should contact and how is it confirmed they are closed out.
- 8. Manage relationships.** The contract may be coming to an end but remain professional with the contractor.

## Early termination

In certain circumstances it may be necessary to terminate a contract early. Early termination will be necessary when:

- **Plans change** – e.g. we no longer decide to proceed with works or services as planned.
- **A contractor defaults.** E.g. is in breach of contract because the works or services are not delivered.
- **The contractor goes into liquidation.**
- **Mutual consent.** This can be the outcome of an unresolved dispute.

In an early termination situation as contract manager you need to ensure:

- **Customers continue to receive a high quality service**
- **Risks to the Association are minimised**

It is your responsibility to:

1. **Have a contingency plan** – it is essential you think about the lead ins to procure an alternative provider before you terminate the existing. See section on procurement lead ins under the exit planning section above.
2. **Highlight the risks.** Ensure your Director is aware and the risks around early termination are captured in the operational or strategic risk registers as appropriate.
3. **Terminate the contract in the right way.** Take legal advice and ensure you follow the steps in the contract. Both parties will need to sign off the termination.
4. **Communicate to stakeholders.** If contractors are changing or there will be a gap in service provider you need to tell them why, what we are doing about it and where to direct any queries. It is particularly important CCT are fully briefed.

In liquidation situations the services are likely to terminate immediately and potentially with no warning. In these circumstances you should follow the Business Continuity and Emergency Plan until you are able to put in place a specific contingency plan.

## Contract completion and post contract review

When a contract is coming to an end it is vital that you follow the checklist below:

**1. Retain key documents** in line with the retention schedule which can be found [here](#). Key documents should include: tender and tender return, contract or letter of acceptance, statutory contents, health and safety file/operating manual for works contracts, relevant insurance and guarantee documentation.

**2. Manage stakeholders.** Including customers, other staff or other partners. Ensure they know the contract is coming to an end, who the new contractor is, and how any issues should be addressed, e.g. defects.

**3. Agree timeframes for final accounts and practical completion** – including with your employer's agent if using. E.g. a reactive or cyclical contractor would need to send in their final bills no more than two months after the end of the contract. For major works contracts timelines for practical completion and defects to be closed out will be set out in the contract and agreed prior to commencement. It is essential they are followed.

**4. Ensure any customer data or confidential business data held by the contractor is destroyed** and documentation is provided by the contractor to certify this. In some cases we may request that all or part of this information is returned to us instead of destroyed, e.g. where the contractor has information that we do not hold ourselves.

**5. An effective handover is put in place** with the new contractor – if an ongoing contract.

**6. Complete a contract completion report.** A format can be found at [appendix 3](#). This should include: lessons learnt; quality assessment and cost assessment; customer feedback; health and safety. If this is a new build contract this document should be shared with the New Build User Group. If this is another kind of contract this should be shared with the Operational Team.

## Appendix 1: Example minutes and action tracker



### **MARYHILL HOUSING ASSOCIATION LIMITED**

#### **MINUTES OF THE JOE BLOGGS CONTRACTOR MONTHLY MEETING** **HELD ON THURSDAY 25<sup>th</sup> OCTOBER 2018 AT 2.00 PM** **AT 45 GARRIOCH ROAD, G20 8RG**

#### **PRESENT:**

<b>Joe Bloggs</b>	<b>Attended</b>	<b>Apologies</b>
Mr Happy – Contracts Manager	✓	
Mr Grumpy – Commercial Manager		✓
<b>Maryhill</b>	✓	
Little Miss Sunshine – Senior Property Officer	✓	
Little Miss Tiny – Health and Safety Manager	✓	

#### **MINUTES ISSUED TO:**

All attendees and apologies

Director of Operations – Maryhill

Director of Operations – Joe Bloggs Contractor

<b>Item</b>	<b>Lead</b>	<b>Deadline</b>
<b>1. Approval of previous minutes</b>  Minutes approved.		
<b>2. Performance</b>  MH raised concerns about Building Contractor's performance in terms of response times (only 82% in target against a contractual KPI of 90%). This failure has been consistent across two months therefore MH would be issuing contractual fines of £1000 per month from next month until the target is achieved. MH confirmed this issue had also been escalated to the Director of Operations.	<b>AB</b>	<b>24.12.18</b>
<b>3. Finance and Invoicing</b>  Building Contractor raised concerns about timeliness of MH's invoice processing and explained formal proceedings would commence if		

<p>outstanding debt of over two months remains unpaid by the end of the month. MH confirmed all invoices dated November would be processed and confirmed all future invoices would be processed within two weeks.</p>	<p><b>AB</b></p>	<p><b>30.11.18</b></p>
<p><b>4. Complaints</b></p> <p>Two complaints discussed:</p> <p><b>Ref 100</b> (missed appointment)  <b>Ref 101</b> (operatives' shoes soiled carpet)</p> <p>Building Contractor confirmed would be contacting both customers today to offer a £30 voucher gesture of goodwill.  Building contractor confirmed operatives would be issued with overshoes and trained on when to use them.  Building contractor confirmed planners will always call ahead when operatives at risk of missing appointments. Training will be provided to planners.  Building Contractor will confirm to MH the outcome of this by the end of the week.</p>	<p><b>CD</b></p>	<p><b>21.11.18</b></p>
<p><b>5. Any other business</b></p> <p>MH informed Building Contractor about new temporary maintenance officer starting in the team from next week to cover staff absence. Contacts provided.</p>		
<p><b>6. Date of next meeting</b></p> <p>26<sup>th</sup> November, 2pm, 45 Garrioch Road.</p>		

**Example action tracker**



**Joe Bloggs Action Tracker – October 2018**

**Monthly Meeting 28 April 2018**

<b>Minute</b>	<b>Action</b>	<b>By Who m</b>	<b>Update/Anticipated Completion Date/Complete</b>
3	<b>Access issues</b> AB to provide keys to roof space at 22 Maryhill road to allow for inspection to take place	AB	After a considerable amount of searching it has been confirmed that the keys for this roof space have been misplaced. A job was raised on 10.10.18 for the contractor to attend and cut off a lock, fit a new one and issue the keys back to Maryhill. Keys will then be issued to Joe Bloggs.

**Monthly Meeting 20 June 2018**

5	Training records CD to provide training records of new staff member Mr Elf who has started to work on the contract to confirm he has completed working at heights training.	CD	Mr elf Completed working at heights training in July 2018 however delay in receiving certification. Mr Happy chasing Joe Bloggs training team and certificate will be provided by 30.10.18
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**Monthly meeting 25<sup>th</sup> October 2018**

2	<b>Performance</b>	AB	
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	MH would to issue contractual fines of £1000 per month from next month until the target is achieved.		
3	<p><b>Finance and Invoicing</b></p> <p>MH to ensure all invoices dated November would be processed and confirmed all future invoices would be processed within two weeks.</p>	AB	
4	<p><b>Complaints</b></p> <p>Building Contractor to confirm to MH by the end of the week that the following is complete:</p> <ul style="list-style-type: none"> <li>- Building Contractor contacting complainants for complaints ref 100 and 101 to offer a £30 voucher gesture of goodwill.</li> <li>- Operatives to be issued with overshoes and trained on when to use them.</li> <li>- Planners to always call ahead when operatives at risk of missing appointments. Training to planners to be provided.</li> </ul>	CD	

## Appendix 2: Example Review Meeting Agenda

<b>MEETING:</b>	Joe Bloggs Contractor Monthly Operational Meeting	
<b>DATE OF MEETING</b>	Thursday 29 November 2018	
<b>TIME:</b>	2pm	
<b>VENUE</b>	45 Garrioch Road	

Time	Item No.	Title	Lead
2.00	1	Apologies	All
2.05	2	Approval of Previous Minutes: - 25 October 2018	Chair
2.10	3	Performance – KPIs	Maryhill
2.30	4	Complaints	Maryhill
2.40	5	Improvements – service development	Maryhill/Joe Bloggs
2.50	6	Health and safety	Maryhill/Joe Bloggs
3.00	7	Progress against programme	Joe Bloggs
3.10	8	Community benefits	Joe Bloggs
3.20	9	Contractual changes	Maryhill/Joe Bloggs
3.40	10	Finance and invoicing	Maryhill/Joe Bloggs
3.50	11	Communications opportunities	Joe Bloggs
4.00	12	Any other business	All

### **Appendix 3: Contract completion report – example format**

**Aim:**

To understand the success and or failures of the contract

**When:**

At the contract completion (possibly at a mid-point in the contract)

**What to include:**

Depending on the size of the contract you may not include all of the below.

Contract documentation

Object of the Contract

KPI's

Finance/cost

Quality review

Specification review

Customer feedback

Lesson Learned

Client feedback

Contractor feedback

Review of Project Initiation Document (if relevant)

Archive/storage of documentation