

IMSP008: MOBILISATION

APPENDIX 9: MOBILISATION PROJECT PROJECT PLAN

Version 3.0 (September 2020)

Mobilisation Lead: Carly Glover

Go-live date: 01/04/2022

A: GUIDANCE

What is the Mobilisation Project Plan?

The Mobilisation Project Plan ("Plan") is the key document that will be used by the Mobilisation Project Team to record, manage and update all key mobilisation actions in one place. The Plan is split into the following tabs:

Ref:	Tab	Description/Purpose	Instructions
A	Guidance	Guidance on how to use the Mobilisation Project Plan Template (this tab)	See Below
B	Roles & Contacts	Summary list of Mobilisation Project Team members, key client contacts and others as required	The Co-ordinator will complete and maintain/update the roles and contacts section of the Mobilisation Project Team, Client Landlord and any other contacts as required
C	Risk Register	Key risks identified from Kick Off meeting and throughout the mobilisation along with actions to mitigate	The Lead will finalise the risk register following the initial Kick Off meeting and maintain/update throughout the mobilisation
D	Critical Milestones	Critical actions that must be delivered to ensure mobilisation success, broken down by Specialist (e.g. 3. Customer & Community Success)	The Lead will finalise the critical milestones following the initial Kick Off meeting and maintain/update throughout the mobilisation
E	Information Requests	Log to track requests for information	Specialist leads will ensure updates on Information Requests are provided to the Co-ordinator on a weekly basis along with Plan action updates. The Co-ordinator will maintain/update the Information Request log throughout the mobilisation
F	Governance and initial setup	Preparatory actions for mobilisation lead to undertake	
	1 Bid Team	Project plan broken down by Specialist (e.g. 12: Operations)	Each Specialist lead will:
	2 Legal		
	3 HR		
	4 Operations		a) Complete the tab for their area of responsibility in full by the deadline agreed at the Kick Off Meeting. The initial update will include amending/adding/removing actions in the template as required to meet the needs of the specific mobilisation (hover over column headers for instructions)
	5 Compliance - electrical and gas		b) On an ongoing basis, the Specialist lead will update all actions in their area of responsibility on the project plan stored on Teams at least one day before the Weekly Progress Meeting
	6 Health & Safety		c) The Co-ordinator will update the Plan overall from all updates received on a weekly basis for use at the Weekly Progress Meeting and store on Teams
	7 Central Finance		d) Supplementary appendices including templates/presentations are referred to in certain specialist areas including:
	8 Customer & Community Success		Appendix 9a: TUPE Presentation Template (see Tab 4. Operations)
	9 IT		Appendix 9b: Induction Training Plan with Resource Template (see Tab 4. Operations)
	10 Apprentices, learning & development		Appendix 9c: Induction Agenda Template (Operative) (see Tab 4. Operations)
	11 Marketing and Comms		Appendix 9d: Induction Agenda Template (Planners & Supervisors) (see Tab 4. Operations)
	12 Subcontractors & commercial		Appendix 9e: Floorwalking and Go-Live Plan (see Tab 4. Operations)
	13 Procurement & Fleet		Appendix 9f: Subcontractor Master List (See Tab 12. Subcontractors & Commercial)
	14 Out of hours		
	15 Information Security		
	16 Other		

B. ROLES AND CONTACTS

Mobilisation Project Team			
Role	Name	Contact Phone	Contact Email
Mobilisation Lead			
Specialist Leads:			
1 Bid Team	Kelley Blanchflower		
2 Legal	Leanne Nicolay		
3 HR	Kelly Tapley		
4 Operations	Jon Steward & Gary Luscombe		
5 Compliance - electrical and gas	Pat Woodhouse		
6 Health & Safety	John Henry		
7 Central Finance	Darren Vernon & Neil Erwood		
8 Customer & Community Success	Laura Siddals		
9 IT	Richard Pollard & Ian Davies		
10 Apprentices, learning & development	Mears Learning		
11 Marketing and Comms	Paddy Grace		
12 Subcontractors & commercial	Jon Steward & Gary Luscombe		
13 Procurement & Fleet	Martin Gaffney		
14 Out of hours	TBC		
15 Info Security	Rhys Green		
Client Contacts [Insert Client Landlord Name]			
Role	Name	Contact Phone	Contact Email
Repairs lead	Neil Bugden <Neil.Bugden@haverling.gov.uk>		
Repairs and Voids manager	Daniel Hadrava <Daniel.Hadrava@haverling.gov.uk>		
Voids lead	Liam Knight <Liam.Knight@haverling.gov.uk>		
IT lead	David Clifton <David.Clifton@haverling.gov.uk>		
Other Contacts [Insert Organisation Name]			
Role	Name	Contact Phone	Contact Email
Other Contacts [Insert Organisation Name]			
Role	Name	Contact Phone	Contact Email
Other Contacts [Insert Organisation Name]			
Role	Name	Contact Phone	Contact Email

D. RISK REGISTER

Ref:	Risk	Impact	Owner	Lead	Control to Mitigate Risk	Due Date	Progress Update	Status
A	Mobilisation Project Management/Governance							
1								
2								
3								
1	Bid Team							
a								
b								
c								
2	2 Legal							
a								
b								
c								
3	3 HR							
a								
b								
c								
4	4 Operations							
a	LBH - Resourcing							
c								
5	5 Compliance - electrical and gas							
a								
b								
c								
6	6 Health & Safety							
a								
b								
c								
7	7 Central Finance							
a								
b								
c								
8	8 Customer & Community Success							
a								
b								
c								
9	9 IT							
a								
b								
c								
10	10 Apprentices, learning & development							
a								Closed
b								
c								
11	11 Marketing and Comms							
a								
b								
c								
12	12 Subcontractors & commercial							
a								
b								
c								
13	13 Procurement & Fleet							
a								
b								
c								
14	14 Out of hours							

a								
b								
c								
15	15 Info Security							

E. CRITICAL MILESTONES

Ref:	Critical Milestone	Lead	Date Due	Progress Update	Status
A Governance					
1					
2					
1 Bid Team					
a	Bid commitments completed				
b	Overview presentation completed for kick off meeting				
2 Legal					
a	Letter of intent/contract				
3 HR					
a	Obtain Due Diligence information				
b	Receive and interpret contractual information				
c	Serve Measures				
d	Deliver Group presentation				
e	Agree template for 1:1 meetings				
f	Conduct 1:1 meetings				
g	Update measures				
h	Start process of agreeing proposed structure with staff				
i	HR1 Form to be logged				
j	Start consultation on redundancies				
k	Start process of agreeing selection criteria				
l	Selection Criteria applied				
m	Dismissals to be applied by - all staff to work PILON?				
4 Operations					
a	Bid kickoff meeting with all relevant parties				
b	Structure confirmed				
c	Recruitment engaged as required				
d	Processes for all workstreams established				
e	Key client contacts established				
f	Inductions planned and delivered				
5 Compliance - electrical and gas					
a					
b					
6 Health & Safety					
a	Confirm PPE ordered with Procurement				
b	Ensure all PPE distributed at go live				
c	Is BSc happening before go live				
d	Deliver training				
e	Waste Management Solution				
f	Existing training requirements - training Matrix for exiting operatives				
g	Asbestos Awareness/ Cat B Removal requirements				
h	PAT Testing Regime - new tools/ existing tools				
7 Central Finance					
a	Operative rates in MCM				
b	Mobilisation costs recorded and captured especially any Task Team costs.				
c	Invoicing/payment process agreed before contract start				
d	Overhead Structure agreed pre restructure and post restructure with timelines and costs associated.				
e	Branch Forecast				
8 Customer & Community Success					
a					
b					
c					
d					
e					
f					
9 IT					
a					
b					
c					
10 Apprentices, learning & development					
a	Apprentice registration needs to be transferred to Mears				
b	Confirm qualifications of staff - certificates required				
c	Identify staff on formal qualifications that need day release				
11 Marketing and Comms					
a	Website branding				
b	Letter/administration branding				
c	Office branding				
d	Communications plan (internal/external)				
e	web2print				
f	Communications delivery (internal/external)				
12 Subcontractors & commercial					
a	Appendix SP12a (Subcontractor Master list) completed				
b	MCM contract and status setup completed				
c	MSP training planned/delivered				
d	Subcontractor rates in MCM				
e	Appendix SP12a shared with general manager				
13 Procurement & Fleet					
a	Office premises identified and lease agreed				
b	Van numbers confirmed and ordered				
c	Tool hire requirements confirmed				
d	Driver details obtained and validated				
e	Uniform requirements captured				
f	Procurement handbook for the branch completed				
g	Van stocks confirmed and ordered				
14 Out of hours					
a	Out of hours process confirmed				
b	Mears Hubs briefed and aware				
15 Info Security					
a	Completed Data Privacy Impact Assessment (DPIA) (where required)				
b	Complete Information Sharing Agreement (ISA) with client				
c	Complete Information Sharing Agreement (ISA) with suppliers/subcontractors				
d	Confirm that terms of ISA and/or contract as it applies to Information Security are understood by branch management team and staff				
e	Appoint a Branch Information Security Lead (BISL) with support from Divisional Information Security Lead				
f	Deliver 'Understanding GDPR' elearning as part of induction for all staff and operatives deliver latest Information Security Tool Box Talk				

F. INFORMATION REQUEST LOG

Ref:	Specialist Area/Function	Requested By	From Whom	Information Requested	Date Requested	Date Response Received	Progress Update
1	Repairs WIP data	LC	LBH	Detail of current WIP	19-Jan-22	21-Jan-22	Initial data received, req address info to be added
2	Asset keys and fobs	LBH	LC	List required	24-Jan-22		Forwarded to GL/JS for response
3							
4							
5							
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19							
20							
21							
22							

GOVERNANCE AND INITIAL SETUP

Lead: [Insert name and job title]

Ref	Action
1	Create MS Teams Channel for internal governance
2	Create external MS Teams Channel (for client engagement) if applicable. NB: Clearly mark this as external facing.
3	Arrange for guest account setups for external users (if applicable). Request via IT.
4	Agree mobilisation team with RD
5	Arrange initial kick off meeting as per bid team action

Action Plan		
If action is dependent on another action give details	Action Lead	Due Date

Progress Update & Risks/Issues	Status	Completion Comments
	Completed	
	Not Applicable	
	Not Applicable	
	Completed	
	Completed	

BID TEAM**Lead: Kelley Blanchflower**

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
1	Notify COO of contract win and standstill period (do not update CMS until after standstill)					Completed	
2	Once cleared to do so, notify legal in preparation for contracts and send bid synopsis					Completed	
3	Inform Marketing & Comms of the key win themes, commitments etc for publicity/press releases					Completed	
4	Confirm bid team handover meeting with lead operating team(quality & commercial) - Appendix 6 - Bid Handover/Kick Off meeting presentation					Completed	
5	Compile Bid Commitment Log Template (Appendix 4) and upload into mobilisation Teams Channel, with complete submission (including appendices and clarification log), ITT docs and bid synopsis (Appendix 5)					Completed	
6	Advise of any other issues arising from the submission					Completed	

LEGAL**Lead: Leanne Nicolay**

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	LEGAL						
1	Letter of Intent					Not Started	
2	Contract					Not Started	
3	Agree Draft Contract		LN	01-Apr-22	Awaiting legal team update from LBH	Not Started	
4	Issue Contract for Execution		LN	01-Apr-22		Not Started	
5	Execute Contract		LN	01-Apr-22		Not Started	
6	Performance Bond/Parent Company Guarantee		LN	01-Apr-22		Not Started	
7	Agree terms with Client		LN	01-Apr-22		Not Started	
8	Issue PB/PCG		LN	01-Apr-22		Not Started	
9	Tenancy Agreement		LN	01-Apr-22		Not Started	
10	Agree Licence to Occupy		LN	01-Apr-22		Not Started	
11	Agree Tenancy Agreement terms with Client		LN	01-Apr-22		Not Started	
12	Execute Tenancy Agreement		LN	01-Apr-22	Awaiting CEME legal team update	In Progress - At Risk	
13	Admissions Agreement		LN	01-Apr-22		Not Started	
14	Agree terms with Client		LN	01-Apr-22		Not Started	
15	Execute AA and issue Pensions Bond		LN	01-Apr-22		Not Started	
16	Agree principles on KPI implications		LN	01-Apr-22		Not Started	
17	Principles of implications on payment and KPIs agreed		LN	01-Apr-22		Not Started	
18	SLA Framework		LN	01-Apr-22		Not Started	
19	Ensure all legal obligations are met prior to contract commencement		LN	01-Apr-22		Not Started	

HR Lead: Kelly Tapley							
Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	TUPE						
1	Review commercial contract (or letter of intent if contract not available) to ascertain whether there are TUPE provisions increasing statutory requirements to the process					Completed	
2	Make contact with Transferor to obtain due diligence				Updated anon data received 18/2	In Progress - On Target	
3	Establish if there is a recognised Trade Union in respect of the transferring employees.				Requested from Breyer	In Progress - On Target	
4	Assess due diligence, determine risks & opportunities (including whether restructure is required post transfer)	Mobilisation Manager			Bonus scheme, not in scope role being discussed	In Progress - On Target	
5	Ensure full knowledge of pension schemes in place and requirements post transfer (i.e. check if LGPS and admitted body status). Liaise with Mears Pension team on arrangements if required.				LGP's - contact made with pensions	In Progress - On Target	
6	Receive Employee Liability Information from Transferor, ensure this is complete (i.e. required 28 days before transfer or extra action needed to write about TUPE obligations)					In Progress - On Target	
7	Take care to ensure full knowledge of benefit schemes (excl pension) in place and required post transfer e.g. life assurance benefit, income protection, PHI etc.					In Progress - On Target	
18	Determine proposed transfer measures & inform Transferor of initial proposed measures				Working hours	In Progress - On Target	
8	Agree with Transferor timetable for consultation programme. Obtain agreement to joint meetings.				Monday 7th March - awaiting confirmation of timetable	In Progress - On Target	
9	Agree with Transferor timetable for 121 meetings.				Monday 7th March - awaiting confirmation of timetable	In Progress - On Target	
10	Confirm elected reps with Transferor and confirm their mandate (for TUPE and redundancy if applicable)				Breyer have confirmed elected reps are in place (2)	In Progress - On Target	
12	If agreed with Transferor invite to 121 meeting - to include requesting evidence for Right to Work checks, competency cards, certificates, qualifications. Decide if DBS check to take place pre or post TUPE.				Right to Work, 48 Hour Opt out, Driver Agreement - part of Workday onboarding	In Progress - On Target	
13	If agreed with Transferor conduct 121 factoring in any queries arising from due diligence, complete vehicle license check, uniform order form, Right to Work check, certificate check etc. Completion of forms - HMRC Starter Checklist, New Starter Form, 48 Hour Opt	Ensure availability of member of Procurement/ComplianceH & S teams to attend 121s			07/03/2022	In Progress - On Target	
15	Confirm those on transfer list are in scope and ensure those who are not are properly challenged					In Progress - On Target	
16	Update assessment of risks & opportunities of proposed staff transferring					Not Started	
17	Determine & cost any additional work streams					Not Applicable	
20	Confirm whether any employees are on long term absence or maternity leave					In Progress - On Target	
21	Request data on holiday taken & booked; sickness absence; 12 week average pay and personal files for transferring staff from Transferor					Not Started	
22	Write to those who did not attend 121 and conduct any outstanding 121 meetings					Not Started	
23	Consult over restructure (if applicable)						
24	Agree selection criteria (only if restructure)						
25	Update transfer measures and re-send if applicable						
26	Agree final TUPE list						
27	If redundancy is likely issue HR1 form if it is proposed to dismiss 20 people or more						
28	Agree with elected reps redundancy selection criteria & its application						
29	Agree proposed operational structure with ops						
30	Confirm proposed resource plan						
31	Communicate with HR Admin Team to provide update of I&C's, contractual policies & procedures & additional benefits						
32	Provide TUPE EIB template to HR Admin Team for uploading to Workday.						
	Provide employee numbers to Procurement in order for ID cards to be produced and new employees to be set up by IT for MCM etc.						
33	Ensure payroll have sufficient information to pay employees - bank details to be added to Workday						
34	Write to employees to confirm those at risk if applicable						

35	Ask for volunteers if applicable						
36	Apply selection criteria if applicable						
37	Advise staff provisionally selected if applicable						
38	Consult with staff to mitigate/avoid redundancy if applicable						
39	Dismiss if applicable						
40	Take proactive steps to manage survivors if applicable						
41	Work with Branch Manager to develop an HR People Plan to ensure delivery of contract deliverables						
42	Write to new employees to confirm name of employer, applicable policies and any other relevant info on T&C's (i.e. on measures letter to each employee)						

OPERATIONS

Lead: Lucas Critchley, Gary Luscombe & Jon Steward

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	LOGISTICS PLANNING						
1	Tupe and Client Communication		LC/GL/JS			In Progress - On Target	
2	If applicable, create external MS Teams area for TUPE staff. Consult with HR BP prior to doing this.		LC/GL/JS			Not Applicable	
3	Deliver Transferree Questionnaire - see Appendix SP4a (TUPE presentation)		LC/GL/JS		In discussion with KT	In Progress - On Target	
4	Implement team briefs, forums and weekly team meetings		LC/GL/JS			Completed	
B	TEAM STRUCTURE AND DELIVERY						
1	Profile roles for management and key roles		LC/GL/JS			In Progress - On Target	
2	Communicate roles and objectives		LC/GL/JS			In Progress - On Target	
3	Service and Business Support		LC/GL/JS			In Progress - On Target	
5	Recruit interim service controllers		LC/GL/JS			In Progress - On Target	
7	Client to identify areas of work that can go to contractors		LC/GL/JS			In Progress - On Target	
8	Plan to mitigate redundancies, or redundancy plan, if applicable		LC/GL/JS			Not Applicable	
9	Review of staff transferring		LC/GL/JS			In Progress - On Target	
10	Review plan following actual TUPE		LC/GL/JS			Not Started	
11	Ensure onboarding requests are logged in ServiceNow for IT	Staff need to be in Workday	LC/GL/JS			Not Started	
C	TASK TEAM						
1	Confirm if TT are being applied to this contract and ensure that this is communicated to TT GM		LC/GL/JS			Completed	
2	Design ghost service via task team and admin function (if task team are being applied to this contract)					Completed	
3	Agree scope of TT involvement - e.g. WIP transfer, emergency coverage, complaints works etc					Completed	
4	Brief task team on contract specific processes (if required) and provide outline process map.					In Progress - On Target	
5	Diarise and carry out process handover to ensure TT briefed on contract-specific processes					In Progress - On Target	
6	Confirm OOH handover times as part of handover				Havering are covering p1 and OOH Jobs from	In Progress - On Target	
7	Provide copy of subcontractor matrix to TT					In Progress - On Target	
8	Provide multi-trade definitions to TT - i.e. if an op is a multi, what does this include					Not Started	
9	Ensure TT have Issue to MSP permission on contract (if applicable)					Completed	
D	CLIENT AND TRANSFER						
1	Mobilisation (Temporary Premises)		LC/GL/JS			Not Applicable	
2	Mobilisation of new premises				We are just waiting on the Lease to be signed	In Progress - On Target	
E	CONTRACT GOVERNANCE						
1	Agree partnership management structure & processes		LC/GL/JS			In Progress - On Target	
F	CONTRACT MANAGEMENT						
1	Agree access to all IT systems & confirm client accounts for MCMView access (if required)		LC/GL/JS			In Progress - On Target	
2	List and capture all 'bid promises' and contractual compliance requirements					In Progress - On Target	
3	Draft a workable summary (handbook) of the bid document for day to day contract mgmt purposes					Not Started	
4	Obtain and keep a watching brief on TUPE plans					In Progress - On Target	

5	Review current / agree new audit and quality control processes				Not Started	
6	Agree processes for service innovations and improvements				Not Started	
7	Review current / agree new processes for initiating / endorsing requests for change orders				Not Started	
8	Agree internal contract management peer review meetings				Not Started	
F	CONTRACT PERFORMANCE REVIEW					
1	Review current / agree new processes for KPI performance monitoring	LC/GL/JS			Not Started	
2	Review current / agree new contractual Standard Operating Procedures (SOPs)				Not Started	
3	Licences, insurance, etc				Not Started	
4	Obtain current insurance certificate				Not Started	
5	Waste transfer				In Progress - On Target	
6	Gas Safe Registration				In Progress - On Target	
7	NICIEC Registration				In Progress - On Target	
8	Obtain Asbestos Registration				Completed	
9	Environmental				Completed	
10	Specialist contractors				In Progress - On Target	
11	Agree procurement/ extension to existing arrangements				In Progress - On Target	
G	KPI's					
1	Develop KPI handbook & agree indicators	LC/GL/JS			Not Started	
2	Agree collection process				Not Started	
3	Agree secondary and operational KPI reporting				Not Started	
H	SERVICE DELIVERY R+M					
1	W.I.P, appointments at end of month, booking appts for new start, and are we running on 100% capacity from day1?, communication to who?	LC/GL/JS			Not Started	
2	Draw up procedure to close jobs				Not Started	
3	Agreed procedure to close jobs				Not Started	
4	Agree cut-off date for new jobs & rectification work				Not Started	
5	Agree warranties				Not Started	
6	Establish status of all existing & new jobs on client system(for eg Sx3)				Not Started	
I	VOIDS					
1	Agree location of the clients voids teams (presumed existing)	LC/GL/JS			Completed	
2	Agree process for normal work flow				Completed	
3	Agree process for security screens				Not Started	
4	Agreed process on transition of WIP and backlog of work				Not Started	
5	Agree principles on payment implications				Not Started	
J	PLANNED WORKS					
1	Demobilisation of existing contract if applicable				Not Applicable	
2	Monitor TUPE information & discussions	LC/GL/JS			Not Applicable	
3	Identify contact names and telephone numbers for Outgoing Contractor representative dealing with complaints/ defects	LC/GL/JS			Not Applicable	
K	APPOINTMENTS					
1	Map process	LC/GL/JS			Not Started	
2	Protocol for made & Kept app.				Not Started	
L	PROCESSES					
1	Have a strategy to deal with backlog (Contingency labour ?)	LC/GL/JS			Not Started	
2	Specialist works process (Life of)				Not Started	
3	Additional works process (Life of)				Not Started	
4	Productivity monitoring				Not Started	
5	Pre Inspection Voids Process				Not Started	
6	Post Inspection Repairs Process				Not Started	
7	Follow Ons (Life of)				Not Started	
8	No Access (Life of)				Not Started	
9	Emergency call out (Life of)				Not Started	
10	Cancellations (Life of)				Not Started	
11	Variations (Life of)				Not Started	
12	Recharges (Life of)				Not Started	
13	Voids / Jobbing (Life of)				Not Started	
14	Voids / Improvements / Decent Homes (Life of)				Not Started	

15	Voids welcome Packs					Not Started	
M INDUCTION AND TRAINING							
1	Design and agree induction day content, complete timetable and agenda - Appendix SP4b (Training timetable) and Appendix SP4c (Induction Agenda)	Refer to Induction Checklist SP4e	LC/GL/JS		Brentwood for induction base, to be designed once updated TUPE list received	In Progress - On Target	
2	Confirm induction dates and provide agenda/joining instructions to attendees					Not Started	
3	Deliver inductions and provide attendance records to Mears Learning					Not Started	
4	Confirm in-branch training and transition plan, utilising existing branch support (Appendix SP4d)					Not Started	
5	Communicate training and transition plan to all relevant resources					Not Started	

COMPLIANCE - ELECTRICAL AND GAS

Lead: [Insert name and job title]

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	ELECTRICAL						
1	Go Live Date					Completed	
2	Number of Electricians or those with Electrical in their job title		PW	01/04/2022	Pending TUPE info	In Progress - On Target	3 no names as yet
3	Number of Electrical Apprentices		PW	01/04/2022	Pending TUPE info	In Progress - On Target	None advised
4	Number of Electrical Supervisors		PW	01/04/2022	Pending TUPE info	In Progress - On Target	1?
5	Number of Electrical Managers		PW	01/04/2022	Pending TUPE info	In Progress - On Target	None advised
6	Skills Matrix required of all the above		PW	01/04/2022	Pending TUPE info	In Progress - On Target	Not completed, to be created 7th March following Qualifications Review
B	INTERVIEWS & ASSESSMENT						
1	Number of employees to be Interviewed by Electrical Compliance Team at 1- 1 stage		PW	01/04/2022	Pending TUPE info	In Progress - On Target	3 advised
2	Where and when Interviews to take place		PW	01/04/2022	Pending TUPE info	Not Started	Qualifications Review only at Breyer on 7th March
3	Electrical Questionnaire to be given at same time as 1 - 1's. Operatives to be advised prior to interview. Allow additional hour for this assessment		PW	01/04/2022	Pending TUPE info	Not Started	At Brentwood during induction?
4	Review all Qualifications Certificates at 1-1 stage. Operatives to be advised to bring in originals		PW	01/04/2022	Pending TUPE info	In Progress - On Target	7th March at Breyer
5	Copies to be taken of all Qualification Certificates		PW	01/04/2022	Pending TUPE info	In Progress - On Target	If allowed at Breyer otherwise at Brentwood on 6th April
C	SPECIALIST EQUIPMENT TO BE ORDERED BY TECHNICAL COMPLIANCE OFFICE						
1	Order Test Instruments - (1 set per electrical operative)		PW	01/04/2022	Pending TUPE info	In Progress - On Target	Ordered from SIS to be collected by VO from Broadstairs
2	Order Safe Isolation Equipment- (1 set per electrical operative)		PW	01/04/2022	Pending TUPE info	In Progress - On Target	Ordered from SIS to be collected by VO from Broadstairs
3	Order Voltage Testers - (1 set per electrical operative)		PW	01/04/2022	Pending TUPE info	In Progress - On Target	ordered from SIS to be collected by VO from Broadstairs
4	Order Torque Screwdriver set - (1 set per electrical operative)		PW	01/04/2022	Pending TUPE info	In Progress - On Target	ordered from SIS to be collected by VO from Broadstairs
5	Plant and Equipment database to be completed		PW	01/04/2022	Pending TUPE info	In Progress - On Target	To be created by VO with JP
6	Pre-order "Tablet"		PW	01/04/2022	Pending TUPE info	Not Started	IT
D	TRAINING						
1	Existing training requirements - training Matrix for exiting operatives from out-going contractor		PW	01/04/2022	Pending TUPE info	Not Started	TBC following qualifications review and assessments
2	Electrical Operatives to attend full day Induction/tablet forms training in branch.		PW	01/04/2022	Pending TUPE info	Not Started	Brentwood 6th April
3	Issuing of all test instruments, lock off-kits, voltage testers, torque screwdrivers and On-site guides		PW	01/04/2022	Pending TUPE info	Not Started	Brentwood 6th April
4	Issuing of and Tablet - to include training		PW	01/04/2022	Pending TUPE info	Not Started	Brentwood 6th April
5	Electrical Certification process - see section D2		PW	01/04/2022	Pending TUPE info	Not Started	Brentwood 6th April
6	Safe Isolation Training of non electrical trades as required.		PW	01/04/2022	Pending TUPE info	Not Started	TBC
7	Practical Assessments		PW	01/04/2022	Pending TUPE info	Not Started	OSA within 1 month of contract start
8	Additional training for electrical QS (s)		PW	01/04/2022	Pending TUPE info	Not Started	MCMView set up
9	Send all details to Mears Learning and Development		PW	01/04/2022	Pending TUPE info	Not Started	
10	Review, implement and write any new risk assessments		PW	01/04/2022	Pending TUPE info	Not Started	
E	MISCELLANEOUS						
1	Names of and NICEIC Registration Number of all existing electrical contractors		PW	01/04/2022		Not Started	
2	Name and contact details of NICEIC Registered Qualified Supervisor(s) (QS) and Principle Duty Holder (PDH)						
3	Copy of electrical contractors last NICEIC Annual Assessment						

4	Arrange for new branch to become NICEIC registered under Mears registration Number				Suggest operate under Thurrock NICEIC until a decision is made if its necessary to have own registration		
5	Arrange for PAT testing to take place of all operatives tools before allowing them out on-site						
6	Arrange for PAT testing to take place of Office Equipment						
7	Arrange for Technical Library to be delivered to new branch					Not Applicable	
8	Arrange for first batch of electrical forms to be delivered to branch from Commercial					Not Applicable	
9	Contact details for Client's Electrical Manager						
10	Create and add branch stamp and signatures to MCMView						
11	Create MCMView account for branch electrical QS						
F	GAS						
1	Go Live Date					Not Applicable	Gas is applicable to the void element of the contract, Cap off and where applicable cooker points and cooker point extensions.
2	Number of Gas employees					Not Applicable	
3	Number of Gas Managers					Not Applicable	
4	Number of Gas Supervisors					Not Applicable	
5	Number of Gas Apprentices					Not Applicable	
6	Skills Matrix required of all the above					Not Applicable	
7	Company Gas Safe Registration					Not Applicable	
8	ACS Gas Qualifications signed and sent to Compliance office along with request to register forms					Not Applicable	
9	Flue gas analyser (specification and utilisation of existing to be agreed at time of mobilisation)					Not Applicable	
10	Safe isolation equipment(Standard gas kit..Fluke T110 AND LOCK OFF KIT)					Not Applicable	
11	Extension lead					Not Applicable	
12	Task lighting					Not Applicable	
13	Power tools (To be allocated where applicable)					Not Applicable	
14	Hoover (Type to be agreed dependant on work stream...ie Wet/HVAC)					Not Applicable	
15	RCD					Not Applicable	
16	Miscellaneous or specialist equipment, ie commercial/solid fuel disciplines/lpg/oil (contract specific)					Not Applicable	
17	Temporary continuity bond					Not Applicable	
18	Flue brush kit issued.					Not Applicable	
19	Hand tools and operatives equipment checked for suitability.					Not Applicable	
20	Written gas test taken and passed (as part of 1 to 1 allow extra 30 mins)					Not Applicable	
21	Gas Inductions booked in via Rotherham					Not Applicable	
22	Management, supervisory and office staff inductions and training given by Regional Compliance managers on all Mears IMSP005 Documentation					Not Applicable	
23	Check gas documentation / stickers have been ordered					Not Applicable	
24	Existing arrangements including all local forms such as Smoke detector/co detector requirements identified					Not Applicable	
25	Support documents, Current referencing books such as GIUSP,essential gas safety manual (Gid 1)					Not Applicable	
26	For Building Regulations Part 'L' & 'G' is there a person with responsibility for informing Central Compliance (monthly)					Not Applicable	
27	Gas Safe Cards ordered/issued					Not Applicable	

HEALTH & SAFETY

Lead: John Henry

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	PPE						
1	Number of employees		JH	01-Apr-22		Completed	
2	Go Live date		JH	01-Apr-22		Completed	
3	Confirm PPE ordered with Procurement		JH	01-Apr-22		Not Started	
4	Ensure all PPE distributed at go live		JH	01-Apr-22		Not Started	
B	TRAINING (Liaise with Induction, Learning & Development Lead: Tab 9)						
1	Number of employees needing training		JH	01-Apr-22		Not Started	
2	Obtain SHE Handbooks		JH	01-Apr-22		Not Started	
3	Where and when training taking place		JH	01-Apr-22		Not Started	
4	Is 1 day SHE happening before go live		JH	01-Apr-22		Not Started	
5	Deliver training/Issue Handbooks		JH	01-Apr-22		Not Started	
6	Record on database who has had training and when		JH	01-Apr-22		Not Started	
7	Identify anyone who has been missed		JH	01-Apr-22		Not Started	
C	OFFICE & SITE						
1	Office/Warehouse Location		JH	01-Apr-22		Not Started	
2	Existing arrangements		JH	01-Apr-22		Not Started	
3	Waste Management Solution		JH	01-Apr-22		Not Started	
4	Assessment on premises		JH	01-Apr-22		Not Started	
5	Ensure branch is in accordance with regulations signage, fire extinguishers etc		JH	01-Apr-22		Not Started	
6	Fire Evacuation Plan		JH	01-Apr-22		Not Started	
7	Review, implement and write any new risk assessments		JH	01-Apr-22		Not Started	
8	Stores Training on lifting (Where Applicable)		JH	01-Apr-22		Not Started	
D	MISCELLANEOUS						
1	PAT Testing Regime - new tools/ existing tools		JH	01-Apr-22		Not Started	
2	Ladder inspection - new Ladders/existing ladders		JH	01-Apr-22		Not Started	
3	Existing training requirements - training Matrix for exiting operatives		JH	01-Apr-22		Not Started	
4	Fire Risk Assessmenttr to new premises - Extinguisher requirements		JH	01-Apr-22		In Progress - On Target	JH
5	Asbestos Awareness Training		JH	01-Apr-22		Not Started	
6	Asbestos register for council stock		JH	01-Apr-22		Not Started	
7	Asbestos Survey for branch premises		JH	01-Apr-22		Not Started	
8	Contact Details For Client's H&S representative		JH	01-Apr-22		Not Started	
9	Asbestos Survey for Branch Premises		JH	01-Apr-22		Not Started	
10	Scaffold Register		JH	01-Apr-22		Not Started	
11	Contact details for Client's H&S Rep		JH	01-Apr-22		Completed	The Clients H&S Rep is Sally Gammer. Email address Sally.Gam

CENTRAL FINANCE

Lead: Darren Vernon & Neil Erwood

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	CENTRAL FINANCE						
1	Confirm Site Coding Structure	standard but check for any client/contract specific requirements	NE/DV			Completed	Confirmed 1333
2	Complete Rate Codes and Payroll Set-Up	TUPE info/ ops setup by IT/HR				In Progress - On Target	Standard SoR v7.1 rates loaded, bespoke rates to be received fr
3	Create All Sales Ledger Accounts					Completed	DHAV002
4	Operatives on MCM	IT/workday				Not Started	
5	Cost Coding	standard but check for any client/contract specific requirements				Completed	Links to Branch number creation
6	Chart of Accounts	standard but check for any client/contract specific requirements				Completed	Links to Branch number creation
7	Check that internal job numbers i.e. codes for Sickness, Holidays etc have been setup	IT in MCM & Gloucester SUN				Not Started	
8	Contract Budget/Forecast					Completed	Budget loaded in SUN
9	Operatives labour rate on MCM	TUPE info/ ops setup by IT/workday				Not Started	
10	Petty Cash	Gloucester				Not Started	
11	MCM Training	Training plan				Not Started	
12	Exclusion process to be agreed					Not Started	
13	Invoicing Procedure	Support from IT BP				In Progress - On Target	Matt Hunt had initial process map with client
14	Aged Debtors	standard report				Completed	Links to Branch number creation
15	Cost Reports	Any client/contract specific reports				Completed	Links to Branch number creation
16	Financial Performance Reports	standard report				Completed	Links to Branch number creation
17	Ensure that the variation process is mapped with operations	Support from IT BP				Not Started	
18	Ensure that the invoice process is mapped with operations	Support from IT BP				Not Started	

CUSTOMER & SOCIAL IMPACT

Lead: Laura Siddals

Ref	Action
A	CONTRACT/CLIENT SPECIFIC REQUIREMENTS
1	Agree mobilisation team for culture/customer/social value
2	Will Contractual Obligations/promises have an effect on Service Delivery? Review any agreed 'customer' SLA's & KPI's - do they match contract?
3	Look at contractual commitments regarding Social Value
4	What are contractual Customer KPIs and measures?
5	Review contract bid commitments document for customer deliverables
B	PEOPLE
1	Identify with HR and GM which 'customer' roles will be filled by TUPE
2	Identify with HR and GM which 'customer' roles need recruiting for and support recruitment
3	Attend Group Consultations and 1-1's if Customer position is on TUPE list (liaise with HR lead)
4	Support interviewing for any requirement for CLO role recruitment with contract management
5	Work with operations to align expectations of CLO role; structure and delivering/monitoring of tasks
6	Specific induction for colleagues in CLO roles, go through job role and set expectations, deliver Customer and social value approach / strategy and documentation
7	Ensure access to all required customer systems is in place, such as; One Touch
8	Group Customer Induction to be delivered? Agree date/location/facilitator
9	Making a Positive Difference - CORE Training programme to be delivered? Agree date/location/facilitator
10	Is call handling training required for Call Centre/team & Planners?
C	CUSTOMER/STAKEHOLDER ENGAGEMENT
1	Local Surgeries (Information Points)
2	Local Management Committees
3	Community Police contacts
4	Social Services - is there a Respite available
5	Local Tenant Groups meetings, where and when are they
6	Local Community Initiatives currently underway
7	Meetings with councillors
8	Develop a Social Value plan inline with bid commitments / share and sign off with operations
9	Are Braille Stickers required? Agree wording and arrange delivery ready for Go Live
10	Obtain enough Language Line Cards for relevant staff in time for 'go live' date
11	Establish links with client recommended Tenant Forums

12	Identify client contacts - Customer & Social Impact
D	PROCESS & INNOVATION
1	Review and create/amend process flow charts with client for Customer Success
2	Review and track customer journey mapping/processes with client for Customer Success
3	Review and understand any requirement to create/amend customer charter with client for contract
4	Agree any 'customer' letter content with client and mobilisation team (customer Letters produced generically, client system or MCM for appointments)
5	Customer complaints - review client process map for review to agree data capture method and contact management process - Will Client or Mears lead? Set up One Touch access for key branch stakeholders
6	Agree Customer Satisfaction survey process, questions and capture method - liaise with Group Customer Insight team to establish VOC requirements and system set up for Go Live
7	Work with Operations to understand Client No Access/missed Appt process - share with Marketing & Comms lead for design/branding requirements and ordering
8	Communicate any Mears Group Customer & Social Impact reporting requirements/dates
9	Introduce Social Value toolkit i.e. measurement/Insight Mapper/Reporting
10	Client reporting framework and calendar for SV / customer satisfaction, complaints

If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues
	LS	01/02/22	
	LS	31/03/22	
	LS	01/02/22	
	LS	31/03/22	
	LS	01/02/22	
	LS	01/04/22	
	LS	01/04/22	
	LS	01/04/22	
	LS	01/04/22	
	LS	01/04/22	
	LS	01/04/22	
	LS	31/03/22	
	LS	04/03/22	
	LS	04/03/22	
	LS	04/01/22	
	CSM	01/04/22	
	CSM	01/04/22	
	CSM	01/04/22	
	CSM	01/04/22	
	LS/CSM	01/04/22	
	CSM	01/04/22	
	CSM	01/04/22	
	LS/CSM	01/04/22	
	CSM	01/04/22	
	CSM	01/04/22	
	LS	01/04/22	

[illegible]

Status	Completion Comments
Completed	Group established - weekly meetings in place
In Progress - On Target	
Completed	
In Progress - On Target	
Completed	
In Progress - On Target	
Completed	Danny Meyer appointed as CSM for contract
In Progress - On Target	
In Progress - On Target	
In Progress - On Target	
In Progress - On Target	
In Progress - On Target	
In Progress - On Target	
In Progress - On Target	
In Progress - On Target	
Not Applicable	
Not Started	
Not Started	
Not Started	
Not Started	
Not Started	
Not Started	
Not Started	
In Progress - On Target	
Not Started	
Not Started	
In Progress - On Target	

In Progress - On Target	
In Progress - On Target	
In Progress - On Target	
Not Started	
In Progress - On Target	
In Progress - On Target	Finalising process, maps created (Client/Mears involvement in complaints mgmt)
In Progress - On Target	Meeting held with client - VoC to go live for 1/4/22 - questions proposed, awaiting client sign off
Not Started	
In Progress - On Target	
Completed	Agreed monthly reporting on SV activity at Core Group once contract live
In Progress - On Target	

IT

Lead: Richard Pollard, Ian Davies

Ref	Action	If action is dependent on another action give details
A	PHYSICAL LOCATIONS	
1	Operators to confirm required site(s) for delivery. This could be new site(s), expansion of existing sites, or co located with clients. Each site requires its own entry and should be named. Remobilisations should be treated like new sites initially to review setup is still correct.	Operations
AA	NEW SITE (DELETE/REPEAT)	
1	Confirm requirements for location	Operations
2	Field Support Team to Visit site to specify requirements	Procurement (normally)
3	Order Lines as required	
4	Printing Requirements Confirmed/Ordered/Delivered	Operations
5	Hardware Requirements (e..g laptops, igels, monitors etc) Confirmed/Ordered/Delivered	Operations
6	still	Operations
7	Networking Requirements Confirmed/Ordered/Delivered	Operations
8	Mobile Requirements (e.g. phones, tablets SIMs) Confirmed/Ordered/Delivered	Operations
9	Contingency Plans (e.g. 4G Router)	
10	Document Site for Handover to BAU	

C	INTERFACING (Housing Management System)	
1	Process Overview (lead system, clients systems etc)	
2	Interface Overview (requirements, specificaiton etc).	
3	Agree Test Plan.	
4	Confirm Detailed Specifications - General Data	
4a	<i>*Address Updates Process</i>	
4b	<i>*Tenancy Updates Process</i>	
4c	<i>*Asbestos Information Process</i>	
4d	<i>*Tenant Warning (e.g. Visit in Pairs) Process</i>	
5	Confirm Detailed Specifications - Jobs	
5a	<i>*Job Creation Process</i>	
5b	<i>*Out of Hours Process</i>	
5c	<i>*Job Cancellation Process (1 way / 2 way)</i>	
5d	<i>*Job Complete Process</i>	
5e	<i>*Appointment Creation Process</i>	
5f	<i>*Appointment Update Process</i>	
5g	<i>*Variation Process (time / cost / both)</i>	
5h	<i>*Notes Process</i>	
5i	<i>*Application Process</i>	
5j	<i>*Invoice Process</i>	

5h	<i>*Document Transfer</i>	
6	Confirm Detailed Specifications - Gas Servicing	
6a	<i>*Servicing Job Work Flow</i>	
6b	<i>*Letters</i>	
6c	<i>*LGSR Transfers</i>	
7	Create Interface Documentation for Operator Review	
8	Confirm connectivity to client systems	
9	Interface Development	
10	Interface Testing	
11	Interface Signoff	
12	Validation Errors Email setup and correct people in it	
D	INTERFACING (Asset Management System)	
1	Agree Requirements	
2	TO BE EXPANDED ONCE REQUIREMENTS AGREED	
E	MCM SETUP	
1	Confirm database location for Site	
2	Confirm Contract Requirements for Site	Commercial / IT
3	Confirm Data Requirements and Setup	Commercial / IT
3a	<i>*Address List</i>	
3b	<i>*Priority Codes</i>	
3c	<i>*SOR List (per contract)</i>	
3d	<i>*Uplift Values / Rates</i>	
3e	<i>*Job Types</i>	

3f	<i>*Owners in MCM</i>	
3g	<i>*Trades</i>	
3h	<i>*Appointment Slots</i>	
3i	<i>*Letter Requirements</i>	
3j	<i>*SMS Requirements (Appt Conf, Day Before, On Route, Complete, No</i>	
3k	<i>*Gas asset upload</i>	
3l	<i>*Status / Stage config</i>	
3m	<i>*Invoicing method</i>	
3n	<i>*Operative Work Patterns</i>	
3o	<i>*Operative Hourly Rates</i>	
3p	<i>*Areas</i>	
3r	<i>*Operative Teams</i>	
3s	<i>*Customer Satisfaction Questions</i>	
3t	<i>*MCM User Permissions and Status Permission Config</i>	
4	MCM Test Built	
5	MearsAppoint Built (if required)	
6	MCM UAT Built (if required)	
7	MCM Live Built	
8	Setup Procurement for Contracts	
8a	<i>*Confirm Contract Values</i>	Procurement (normally)
8b	<i>*Setup/Complete Branch Profile</i>	
8c	<i>*Activate Contracts with correct rates</i>	
8d	<i>*Confirm MEPOS Costs coming into MCM (post go live).</i>	
9	Operatives Payment Process Agreed/Setup	
10	MCM Setup Checklist	
10a	<i>*Setup Pin and email distribution list</i>	
10b	<i>*Upload Correct Site Logo (if not default)</i>	

10c	<i>*Upload Electrical Forms Branch Stamp</i>	
10d	<i>*Setup Invoice Sort Code and Account details</i>	
10e	<i>*Request ME3 Profile Setup for Site</i>	
10f	<i>*Payroll and SMS Email Groups Setup</i>	
10g	<i>*Confirm all contracts setup correctly in Sun</i>	
10h	<i>*Hybrid Mail setup and tested.</i>	
10i	<i>*Setup Hotlist Email Address and members.</i>	
F	TESTING	
1	Agree Test Plan	
2	Confirm Connectivity for Testing	
3	Testing Carried Out	
4	Testing Signed Off	
G	NON MCM SETUP	
1	Office Staff Accounts Requested/Setup/Working	
2	Operative Accounts Requested/Setup/Working	
3	Shared Drives	
4	Email Group Requirements (e.g. repairs@)	
5	MCMView Client Access & Training	
6	Additional MCMView contracts added (existing client)	
H	REPORTING	
1	Confirm KPI Requirements (contractual)	
2	Confirm Internal Reporting Requirements	
3	Confirm Client Reporting Requirements	

4	Reporting Specification Agreed	
5	Reports Created	
6	Reports Tested and Signed Off	
I	CHECKS (OTHER TEAMS)	
1	Confirm Users being loaded in Workday for Accounts	Operations
2	Confirm PDAs/Tablets being ordered for Operatives	Operations
3	Confirm Office Hardware is being ordered	Operations
4	Confirm QS Signatures have been uploaded	Compliance
5	Confirm BCP has been produced / updated	Operations
6	Confirm Training Requirements for Staff (and subbies)	Operations
7	Confirm Go Live Support Requirements	Operations
8	Confirm MSP Accounts Created	Procurement
9	Confirm Operatives Setup in MCM (diary, rates, areas etc)	Operations
10	Confirm Specialist Added to System for Usage	Operations
J	PROCESS SIGN OFF CHECK LIST	
1	Branch knows how to do payroll	
2	Branch knows how to processing a work order through to payment.	
3	Branch know how to process an order through MSP and how to train	
4	Branch have nominated people to manage Interface Validation Errors (and	
5	Branch Manager aware of dashboards available.	
6	Branch Manager understands variation process	
7	Branch Manager understands billing process	

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Complete	
Complete	
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Complete	
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Complete	
Complete	
	Process is complete, however client is still debating at which point a VO should be sent
Complete	
Complete	
Complete	

Complete	
N/A	
N/A	
N/A	
In Progress	
Complete	
In Progress	
In Progress	
Post Go Live Activity	
Complete	Keystone - Client require specific spreadsheets to be manually completed by users
Complete	MearsData.SE1
Complete	
In Progress	New Address List received 01/03/22
Complete	
	Have list. Missing Bespoke codes. Client to review

[illegible]

TBC	
Complete	

[illegible]

APPRENTICES, LEARNING & DEVELOPMENT**Lead: Gary Luscombe**

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	LEARNING & DEVELOPMENT						
1	Identify apprentices to be TUPE transferred and current year of study						
2	Obtain info on colleges and training providers relating to apprentices						
3	Obtain review reports from colleges and training providers relating to apprentices						
4	Arrange for transfer of information on existing training and qualifications						
5	Identify employees pursuing qualifications						
6	Obtain information about colleges and training providers relating to trainees						
7	Obtain copies of certificates for all training (include trade qualifications)						
8	Obtain copies of trade cards (i.e. cscs cards, IPAF, CISRS)						
9	Obtain copies of acceptance sheets for Risk assessments/SHE hand book						
10	Information about training waiting list						

MARKETING & COMMUNICATIONS

Lead: Paddy Grace

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	CLIENT SPECIFIC REQUIREMENTS						
1	Will contractual obligations/promises have an effect on service delivery						
2	Branding Finalised						
3	Obtain and Understand External and Internal Communication Processes i.e Newsletters						
4	Will there be Tenant Roadshows Prior to Mobilisation						
5	Attend all customer and communication meetings - Ensure all Minutes and Agendas are sent to the GM						
6	Follow HR Procedure for Recruitment of New Staff if Applicable						
7	Ensure Uniform Requirements have been given to Procurement						
B	SYSTEM DESIGN						
1	Understand Client Correspondence Procedure to Tenants (Format etc) and relay to GM for Process Mapping to include:						
2	Customer Letters produced generically, client system or MCM for appointments						
3	Agree with Client how Tenants will be advised of New Contractor						
4	Work with NBM if photograph of New Contractor Van, Badge etc is required for Tenant Communication						
5	Develop and agree communications plan with client and internally with MEARS (Press / newspapers / web)						
6	Work with Operations to understand Client No Access Process and Devise No Access Cards to be agreed by Client and ordered through Procurement						
7	Understand is any further Customer Cards or Letters are required						
C	INTERNAL COMMS						
1	Agree internal comms message with ops lead and agree date for the message to be uploaded into Connect						
2	Confirm whether new mobilisation is suitable for further comms externally - e.g. website						

Subcontractors and commercial

Lead: Gary Luscombe and Jon Steward

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	COMMERCIAL BID HANDOVER						
1	Arrange a meeting with commercial bid lead & request commercial handover doc completion						
2	Price methodology and hand over of operating budget as per the company P & L format						
3	Identify and confirm bespoke rates (if any)						
4	Subcontractors contacted for pricing/copies of schedules/agreed price						
5	Productivity outputs, sickness levels etc for op's and H.R to monitor production and sickness levels against targets.						
6	Reiterate agreed staff and operational resources including vehicle numbers for op's.						
7	Any performance penalties, incentive mechanisms and pain/gain share etc to be understood by op's and finance						
8	Annual indexation - discuss and agree process for each contract						
B	PROCESS MAPPING						
1	Process map the variation process						
2	Process map the invoice and rejection process						
3	Document required MCM setup based on commercial processes						
C	MCM SETUP						
1	Review tender documentation						
2	Agree contract setup with client - e.g. understanding how client system is split/workstreams/budget codes used						
3	MCM contracts - naming						
4	Schedule of rates - review codes: do these match with the client codes?						
5	Invoicing - review statuses and ensure this matches commercial model						
6	Interface testing with IT: variations, completions, invoicing, rejections						
7	Branch training - running payers notices						
8	Branch training - dealing with specialist invoice queries						
D	SUBCONTRACTORS						
1	Review subcontractor listing from bid handover						
2	Complete subcontractor matrix - see Appendix SP12a						
3	Organise meetings with subcontractors						
4	Complete subcontractor meeting with PCANs agreed						
5	Subcontractor rates added to MCM						
E	MSP						
1	Ensure that subcontractor has access to MSP						
2	Ensure that subcontractor has been trained to use MSP. If no, arrange training session.						
3	Establish subcontractor admin in branch (e.g. who will be using MSP & payer notices)						
4	Branch training for MSP						
F	REPORTS TRAINING						
1	Arrange and carry out branch training on the following reports:						
2	Aged Debtors						
3	Cost Reports						
4	Indirect Cost Report						
5	Supplier Cost Report						
6	Subcontractor Cost Report						
7	Aged Committed Cost Report						
8	Aged GRNI Report						

9	Production Overhead Cost Report					
10	Financial Performance Reports					

PRO
Lead

Ref

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PROCUREMENT

Lead: Martin Gaffney

Action

SUPPLY CHAIN

Obligations to Current Stock and Cost Implications

Stock Purchase History and Current Stores Procedures

Trial Run to Test System Link

Analysis on Van Stock Requirements

Order Van Stocks in time for Distribution Day

Create Procurement handout for distribution to operatives to include all local supplier details & locations

TOOLS & ACCESS EQUIPMENT

Check tool allowance with HR

Hire/Lease / Purchase New Tools & Access Equipment

Identify who needs what, will these be ready for Distribution Day

Complete Asset registration for distribution day

OFFICES / EQUIPMENT

Identify branch / office location

Negotiate Heads Of Terms for lease or agree Tenancy at Will

Design the Office Layout (Covid compliant, Red Thread Guidelines)

Order / arrange furniture transfer

Order Office Signage

Order all other office requirements, stationery, kitchen, sanitation

UNIFORM (3 week turnaround)

Does the Client Require Dual Logo

Get Copy of the agreed logo

Sample of shirt with logo ordered and given to client for approval

Obtain uniform sizing at 1-2-1's

Man pack uniforms ordered for distribution day

Agree secure area for storage of distribution items for distribution day

Identify and order any Special PPE/Uniform Requirements

Liase with GM to organise distribution day

Order PPE bags for each operative and supervisor

Issue of cleaning kits with uniform

Catch up with those people who missed their 1-1 and complete order forms

ID BADGES

ID Badge layout agreed

Obtain photographs for ID's at 1-2-1's

Consult as to whether physical ID badge or PDA on screen version

Employee numbers from HR

Catch up with any employees who did not attend their 1-1 and get order and photograph

Ensure all photographs are named accordingly and given to the GM

Agree with GM Who Will Order

Waste

Provide Reconomy with contract geographics to enable waste transfer stations to be identified / set up
Identify all branch / contract waste requirements including office recycling & confidential waste
Supply Reconomy with vehicle registrations for tipping permits
Provide Vehicle information to enable Reconomy tipping app
Provide tipping locations to operatives / GM
Subcontractors
Liaise with GM / Operations to identify subcontractor trade requirements
Communicate details to Subcontractor Management to open accounts in Sun / Subcontractor Portal
Work with GM / Operations to complete onboarding in time for go live
TRAINING
Liaise with GM / IT regards delivering procurement training to all operatives & office staff prior to go live
Attend branch to provide training / set up on Mepos, MCM, Supplier portals (Commercial, Safpro, Tiger Suplies, AKW)
Be available for floor walking / training on day 1 go live
VEHICLES
Obtain numbers of vehicles required
Calculate/ Obtain types required
Date vehicles required for (GO LIVE)
Date of distribution
Location of distribution and security of the site
Livery design
Racking requirements
Driving Licence information from HR obtained at 1-1

Vehicles ordered
Arrange livery - pre start date
Arrange racking pre start date
Visit distribution premises
Arrange staff to assist handover
Security for Vans prior to Handover
Schedule for collection by new staff
Collate inventory of Van Allocation
Provide vehicle allocation to fleet
Identify who we require copy driving license from still
FUEL CARDS
Number required
Date required for
Vehicles Reg Numbers
Order fuel cards
Van reg on Cards
Collate Inventory of Card Distribution
VEHICLE DISTRIBUTION DAYS
All vehicles at distribution location in time
Collate keys and fuel cards
Hand spare keys to GM / Branch
Any vehicles not collected need to be stored

Stored vans hand keys to branch for allocation post mobilisation

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OUT OF HOURS

Lead: TBC

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	OUT OF HOURS						
1	Discuss client objective and solution design with Mears OOH Hub						
2	Out of Hours Criteria Templates to be discussed and completed						
3	DDI Number Allocation and IVR Recording						
4	Client System Training (If applicable)						
5	Systems Access (MCM OR CLIENT)						
6	Telephony and System Reporting Criteria						
7	Operational Rota's including Sub Contractor/Specialist Contractor Information						
8	Confirm operational contact point for queries/escalations and OOH reporting to be sent to						

INFORMATION SECURITY**Local Lead: Rhys Green****Information Security Lead:**

Ref	Action	If action is dependent on another action give details	Action Lead	Due Date	Progress Update & Risks/Issues	Status	Completion Comments
A	INFORMATION SECURITY						
1	Completed Data Privacy Impact Assessment (DPIA) (where required)	Liaise with Information Security Team				Completed	
2	Complete Information Sharing Agreement (ISA) with client	Liaise with Information Security Team				In Progress - On Target	
3	Complete Information Sharing Agreement (ISA) with suppliers/subcontractors	Liaise with Information Security Team & Procurement				In Progress - On Target	
4	Confirm that terms of ISA and/or contract as it applies to Information Security are understood by branch management team and staff					In Progress - On Target	
5	Appoint a Branch Information Security Lead (BISL) with support from Divisional Information Security Lead	Liaise with Division Information Security Lead				Not Started	
6	Deliver 'Understanding GDPR' elearning as part of induction for all staff and operatives deliver latest Information Security Tool Box Talk					Not Started	
7	Arrange for Secure Shredding service (e.g. Shredit)					Not Started	
8	Add BISL/DISL/GM and other appropriate staff are added to Mears Protect					Not Started	
9	Add appropriate staff member to Mears Archiving Service					Not Started	
10	Ensure all staff have IT accounts and equipment					Not Started	
11	Ensure all staff have ID cards	Liaise with Procurement				Not Started	
12	Ensure BCP in place for branch and service	Liaise with Information Security Team				Not Started	
13	Carry out a security assessment of building/office					Not Started	
14	Set up shared folders and permissions in accordance with guidance (TBC)					Not Started	
15	Create Branch Information Asset Register (BIAR) in conjunction with DISL representative	Liaise with Division Information Security Lead				Not Started	

Completed
In Progress - At Risk
In Progress - On Target
Not Applicable
Not Started
Overdue

Closed
Open

Client
Mears
Shared

High
Medium
Low