PFI Handback

Dust off the contract

Is the full contract suite available? Does this adequately reflect and record all the variations of the project's life?

Gather asset condition information

Assemble all historic asset surveys, understand any handback criteria anticipated by the contract and identify any key gaps in knowledge.

Strategic review

Handback needs to deliver as far as possible an asset that is fit for your future needs as you now see them, not as they were anticipated at the time of FC. The key differences between what you need and what you're entitled to will inform the main areas of negotiation.

Develop outline plan including resources

An internal team similar to the procurement phase is likely to be required. Consider Project Director and Oversight Board resources.

Engage other stakeholders

Collaboration will produce the best outcomes if all parties engage. Early, pro-active dialogue is preferable.



7 years out

7-5 years out:

Key activities:

1-week exercise undertaken by IPA, to include 6 hour workshop based on standard form questionnaire, assessing readiness and understanding of key themes set-out above;

Continue collaborative engagement with other parties;

Agree handback criteria;

Scope and procure handback surveys;

Commence discussions around post-PFI FM/lifecycle requirements;



5-3 years out:

With surveys complete and post-PFI offers developed:

Agree anomalies process;

Agree and cost handback works; Consider and assess post PFI-FM/

lifecycle options;



3-1 years out:

Start enacting handback:
Commission handback works;
Final negotiation of post-PFI FM/
lifecycle proposals;
Commence FM staff processes
(TUPE, pension etc.);
Commercial agreements;





1 year out:

Sign-off handback works;

Mobilise post-PFI FM/lifecycle offer or terminate as appropriate;

Complete staff processes;

Complete handback documentation;

