



CONTRACT MANAGEMENT PIONEER PROGRAMME

Light touch review

PART OF

CONTRACT
MANAGEMENT

SUITE OF TOOLS



HOW TO USE

This is an initial review that poses key questions about the management of individual contracts. It can be completed by individuals or groups of people involved in the management of a particular contract. By answering the questions honestly, areas of concern which need addressing can be readily identified.

A Contract Management Plan (CMP) for a housing project—particularly one involving public sector bodies (e.g. local authority joint ventures, regeneration schemes, or developer-led projects)—should provide a clear framework for managing, monitoring, and enforcing the contract throughout its lifecycle.

It helps ensure the project is delivered on time, on budget, and in accordance with the agreed scope.

1 Is there an up-to-date CMP?

A CMP for a housing project involving public sector bodies (e.g. local authority joint ventures, regeneration schemes, or developer-led projects) should provide a clear framework for managing, monitoring, and enforcing the contract throughout its lifecycle. **This plan will help guide activities and determine who is doing what and when (e.g. reporting, performance reviews, delivery confirmation etc).**

It helps ensure the project is delivered on time, on budget, and in accordance with the agreed terms, while managing risk, performance, and relationships with key stakeholders.

Yes	No	To a degree	Don't know
Comment			

2 Are the contractual obligations identified and understood?

For a local authority housing contract, there are a range of contractual obligations that must be carefully considered to ensure legal compliance, effective delivery, and value for money—particularly given the use of public funds and the long-term nature of housing assets.

These obligations apply whether the authority is:

- Commissioning a contractor or developer.
- Entering a joint venture.
- Using grant funding (e.g. from Homes England).
- Acting as landowner, funder or delivery partner.

For new build and capital schemes, there are particular considerations for specific delivery models:

- Design and Build – Novation of design team and responsibility for design compliance.
- Joint Venture – land drawdown, profit share, governance, funding and resource commitments and exit strategy.

- Development Agreement – triggers for land transfer, targets, performance milestones and payments or land drawdown.

Are the council and the supplier clear about their contractual obligations and timelines?

Yes	No	To a degree	Don't know
Comment			

3 Are the rights and remedies in the contract identified and understood?

Identifying the key tools and systems for managing the contract. Helping to identify and respond to poor performance at the appropriate time (e.g. CMP, KPI dashboard, Risk Register, change log, programme).

Yes	No	To a degree	Don't know
Comment			

4 Are contract records managed and up-to-date?

To ensure there is clarity of where records are stored and what they contain, including any contract variations, extension, performance reports, disputes etc. This is in case the need arises to access such as officer absence.

Yes	No	To a degree	Don't know
Comment			

5 Performance management: is the supplier delivering all services and obligations to contract?

This can cover a range of areas relating to the performance of the contract (e.g. performance reporting, performance over time vs KPIs, discrepancies and disputes, documented supplier reviews and agreed actions). This should also include budget monitoring and payment management.

Yes	No	To a degree	Don't know
Comment			

6 Do we pay the supplier on time?

Yes	No	To a degree	Don't know
Comment			

7 Are end customers/users engaged as part of assessing performance?

Ensures service delivery is optimised for those who should benefit from the service or outcome. This also allows improvements to be identified that could help with cost and/or performance.

Yes	No	To a degree	Don't know
Comment			

8 Is relationship management undertaken and supplier meetings held in line with contract obligations?

Do the frequency and content of review meetings with the supplier fulfil or exceed the requirements of the contract? Do these meetings drive service improvements in areas such as social value?

Yes	No	To a degree	Don't know
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Comment

9 Strategic management: have we undertaken a strategic review of the contract in the last 12 months to ensure it aligns with current corporate objectives?

A proportionate annual review helps to ensure the contract is aligned with current corporate objectives and facilitates contract variation if corporate priorities have changed.

Yes	No	To a degree	Don't know
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Comment

10 Is there an improvement/opportunity plan in place to improve performance and/or create savings?

An improvement plan helps drive better delivery and/or cost benefits from the contract. Typically, this would seek performance and benefits beyond contracted levels. This also serves as a corrective tool to address any contractor, developer or partner issues with regard to agreed standards, timelines or obligations.

Yes	No	To a degree	Don't know
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Comment

11 Is there an up-to-date risk management plan?

That reflects the current risks and the actions to address or mitigate those risks. This could include business continuity plans (maybe a contractual obligation) and/or business failure planning. A review of the supplier's latest financial standing should be included.

Yes	No	To a degree	Don't know
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Comment

12 Has benchmarking been undertaken on the contract within the last 12 months?

Benchmarking the contract's costs and performance helps the council understand whether a supplier is meeting expected levels and/or responding to market innovation. The benchmark could be of specific elements of cost (e.g. material costs that can be easily compared) or the whole service (e.g. comparing vs another local authority that has the same or similar service).

Yes	No	To a degree	Don't know
Comment			

13 Is there an exit plan in place with up-to-date actions (including re-procurement planning)?

This should consider the closing of the contract (whether from natural expiry or early termination), including close-out reviews and lessons learnt; plans for the new contract including embedding lessons into the contract, specification and management approach and transition management (including TUPE).

Yes	No	To a degree	Don't know
Comment			

14 Are regular meetings with the project team held?

These are essential to effectively manage housing contracts, particularly for public sector or joint-venture projects where the risks, timelines, and stakeholder involvement is significant. These should be structured to track progress against programme, monitor performance, resolve issues early, maintain accountability and ensure clear lines of communication and responsibilities.

Yes	No	To a degree	Don't know
Comment			



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