# Project Collaboration Toolkit
# Phase 1 review checklist

| NO. | ACTIVITES | SCALE (5 MOST CONFIDENT) | | | | |
|---|---|---|---|---|---|---|
| 1.1.1 | **1.1 Appoint Collaboration Champion** Has the Project Lead Entity appointed a Collaboration Champion? | 1 | 2 | 3 | 4 | 5 |
| 1.2.1 | **1.2 Undertake Collaborative Capability Self-Assessment and Establish Enabling Climate** Has an ICW / ISO44001 Collaborative Capability Self-Assessment been undertaken by the Lead Project Entity? | 1 | 2 | 3 | 4 | 5 |
| 1.2.2 | Has the Lead Project Entity prepared a shortlist of potential project partners for each project service and supply category? | 1 | 2 | 3 | 4 | 5 |
| 1.2.3 | Has the intention for potential partners to conduct a Collaborative Capability Self-Assessment and share the outcomes been agreed and the methodology established? | 1 | 2 | 3 | 4 | 5 |
| 1.2.4 | Has the strategy for potential project partner engagement been established? | 1 | 2 | 3 | 4 | 5 |
| 1.3.1 | **1.2 Undertake Collaborative Capability Self-Assessment and Establish Enabling Climate** Has an ICW / ISO44001 Collaborative Capability Self-Assessment been undertaken by the Lead Project Entity? | 1 | 2 | 3 | 4 | 5 |
| 1.3.2 | Has the first draft of the Project Behavioural Charter been prepared from Stakeholder Management Conference outputs? | 1 | 2 | 3 | 4 | 5 |
| 1.3.3 | Were the results of Collaborative Capability Self-Assessments discussed and shared at the Stakeholder Management Conference? | 1 | 2 | 3 | 4 | 5 |
| 1.3.4 | Was the Stakeholder Management Conference used to assess organisational values and behaviours as a stage in the Partner Selection Process? | 1 | 2 | 3 | 4 | 5 |
| 1.3.5 | Did the Stakeholder Management Conference develop an aligned set of Project Goal statements based on Lead Project Entity presentation of the Project Brief and Business Case? | 1 | 2 | 3 | 4 | 5 |

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| 1.3.6 | Was the Stakeholder Management Conference event designed and used to develop the foundations for trusting relationships between potential project partners? | 1 | 2 | 3 | 4 | 5 |
| 1.3.7 | Were Stakeholder Management Conference participants afforded the opportunity to demonstrate their capabilities in respect of supporting the project collaboration strategy? | 1 | 2 | 3 | 4 | 5 |
| 1.3.8 | Has the frequency of Periodic Project (Collaboration) Reviews been discussed and agreed between stakeholders? | 1 | 2 | 3 | 4 | 5 |
| 1.4.1 | **1.4 Establish Foundations for Stakeholder Trust** Has an approach to monitoring inter-relationship trust and openly communicating issues related to trust been developed? | 1 | 2 | 3 | 4 | 5 |
| 1.4.2 | Is there an established method for assessment of relationship trust and associated behaviours? | 1 | 2 | 3 | 4 | 5 |
| 1.5.1 | **1.5 Establish Collaboration Plan and Behavioural Charter** Has a Project Behavioural Charter been fully developed from Stakeholder Management Conference output? | 1 | 2 | 3 | 4 | 5 |
| 1.5.2 | Has a list of required signatories to the Project Behavioural Charter been established for execution post partner selection? | 1 | 2 | 3 | 4 | 5 |
| 1.5.3 | Has a Collaborative Relationship Management Plan been developed? | 1 | 2 | 3 | 4 | 5 |
| 1.5.4 | Have critical interfaces and interdependencies between potential partners been documented within the Collaborative Relationship Management Plan? | 1 | 2 | 3 | 4 | 5 |
| 1.6.1 | **1.6 Partner Selection Process** Has a comprehensive Partner Selection Process been established and fully / openly communicated with all stakeholders and potential project partners? | 1 | 2 | 3 | 4 | 5 |

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|---|---|---|---|---|---|---|
| **1.6.2** | Does the Partner Selection Process incorporate criteria and output from the Stakeholder Management Conference and collected data regarding participant performance? | 1 | 2 | 3 | 4 | 5 |
| **1.6.3** | Have the results of potential partner Collaborative Capability Self-Assessments been taken into consideration? | 1 | 2 | 3 | 4 | 5 |
| **1.7.1** | **1.7 Establish Contracting Principles** Has a contracting strategy, based on the principles of fairness and balance of party interests been established to support the project collaboration strategy? | 1 | 2 | 3 | 4 | 5 |
| **1.7.2** | Are the contracting principles and the contracting strategy reflective of balanced Risk and Benefit Framework Agreements? | 1 | 2 | 3 | 4 | 5 |