

Checklist for Starting a Project: Questions to Consider when starting a Project and/or Procurement

This checklist is available on the DQ web site directly from the home page: <http://guidelines.gateway.bbc.co.uk/dq>

Status	Live	Guideline
Contact	DQ Team for help: e-mail dqm@bbc.co.uk	

Intended audience: anyone involved in projects and/ or procurement.

Use: Ideally the checklist should be used before a project / procurement is started. However it can be used at any stage to help with checking all issues have been identified and resolved.

The list of questions is not exhaustive, and is intended to help identify

- what approvals are required
- policies and standards that apply to the project
- who to contact
- who can help
- content for contracts / agreements.

DQ Ref	Version	Date	Last Reviewed	Next Review Due
help_01	01.05	15/03/2006	Mar 2006	Mar 2007

Questions	Useful Information and Links	Response
Have you spoken to your Divisional Technology Representative / Technology Controller?	<ul style="list-style-type: none"> ▪ It is important that you do so before ANY project. They will be able to give advice and guidance on all aspects of the project. List of Technology Representatives and Controllers ▪ Technology Advisors 	
Have you identified the procurement procedure?		
Will you need to go out to tender to choose a supplier?	<ul style="list-style-type: none"> ▪ Guidance on Procurement ▪ BBC Commercial Policy_ : see Fair Trading ▪ Technology Group 	
How does the EU Procurement process apply?		
Does the BBC have an existing Framework Agreement or Preferred Supplier relationship?	<ul style="list-style-type: none"> ▪ Technology Framework Contract with Siemens Business Services ▪ Other existing framework agreements ▪ Contact BBC procurement if in doubt / need help 	
What about the project time scales?	Start date for the work: Delivery Dates(s): Project End Date	
Is a Contract / Legal Agreement required?	<ul style="list-style-type: none"> ▪ Seek advice from the Legal Advisors' Division OR the Technology Direction Legal Team ▪ DQ Legal Policies 	

Have you identified the type of contract required, and the legal and business support needed for the contract?	<ul style="list-style-type: none"> ▪ BBC Legal Advisors' Web Site <p>The BBC will contract on its standard Terms of Trade unless exceptional circumstances exist.</p> <p>All terms of trade can be negotiated.</p>	
What will be your ongoing contract management needs throughout the term of the project?		
What are your requirements?		

Who are the parties involved?

Who is the buyer / customer? Note the BBC contact details	Is it the BBC or one of its commercial subsidiaries? Is the delivery address different?	
Who is the seller / supplier? Are there any other parties involved?	Is it a 3rd party supplier (outside the BBC) or a BBC commercial subsidiary?	
	Is there a framework agreement with this 3rd party supplier in place, or some other existing relationship with the 3rd party supplier?	
	▪ Contract with Siemens Business Services	
	▪ Other existing framework agreements	

<p>Details</p> <p>Company name:</p> <p>Company registration number (if applicable):</p> <p>Company status:</p> <p>The company status and financial stability should be checked prior to entering any contract.</p> <p>Registered address:</p> <p>Contact name:</p> <p>Contact numbers (including fax):</p> <p>Email address</p>	<ul style="list-style-type: none"> ▪ BBC Procurement can organise a company search/credit check. 	
---	---	--

Have you identified what you are Buying?

Are you purchasing Goods?	What type of Goods?	
	Who will own them?	
	Will post acceptance training be required?	
Are you purchasing Equipment?	▪ Procurement	
Have you identified the environmental needs?	▪ Equipment Policies	
Are there any special access / connections required?	▪ Change Management	

Are you purchasing Software?	Any software to be owned should include source code, object code and documentation unless otherwise agreed. Check on what medium the software is to be delivered (e.g. FTP site, disc, CD Rom).	
	<ul style="list-style-type: none"> All software used by the BBC should be properly licensed: see Software Licensing Policy 	
Are you purchasing for the BBC desktop?	▪ Purchasing and testing of software for the BBC Desktop	
Are you required to sign a licence to use the software?	▪ Check with the Legal Advisors' Division OR the Technology Direction Legal Team	
Do you need escrow arrangements for the source code?		
Are you purchasing Services?	What type of services? (E.g. design & development; consultancy; ongoing support & maintenance)	
Will non-BBC personnel be on BBC site / premises?	<ul style="list-style-type: none"> BBC Health and Safety Policy BBC Security Policy Third Party Software Licensing Policy 	
Will suppliers require access to specialist / secure areas?	▪ Secure Access Policy	
What type of specialist work will be required?		
What about Intellectual Property Rights (IPR)		
What type of IPR?	Generally, copyright in all deliverables is to be owned by the BBC unless otherwise agreed.	
Will the BBC own the IP or will it licence it for use?		
Have you identified IPR issues? (contribution, ownership, possible exploitation)	<ul style="list-style-type: none"> For Software see Applications Policy Seek advice from the Legal Advisors' Division DQ Legal Section 	
Are any BBC assets to be supplied to the Contractor?	Such as BBC logos, images, text, audio clips. Any assets supplied must be © BBC. Any equipment must be clearly marked as owned by the BBC. The delivery date and delivery arrangements of any assets to the Contractor should be agreed. Insurance cover for any BBC assets whilst in the use and control of the Contractor must be agreed.	
Will this be a project?	<ul style="list-style-type: none"> Definition of a Project Scope for Technology Investments - which will require approval by Technology Investment Approval Group (TIAG) Policies for Projects 	
Have you identified the project sponsor?	▪ Briefing for Project Sponsors	
What project management methodology will apply?	▪ Project Management Framework	
Has the project funding been identified? Which budget will this be funded from - e.g. departmental, divisional, central?	▪ Refer to the BBC Financial Guidelines OR your Financial Controller/Manager	
If you require approval by TIAG, have you all the	▪ Key Questions for Technology Investments	

information required?	Refer to the relevant Financial Controller(s)/Manager(s) within the Business Division(s) to identify business approvals	
Have you identified all the required approvals, and established the correct order?	<ul style="list-style-type: none"> ▪ Technology Investments 	
	Refer to the relevant Financial Controller(s)/Manager(s) within the Business Division(s) to identify business approvals	
	<ul style="list-style-type: none"> ▪ List of Technology Areas and Technical Advisors ▪ Working with SBS: Project Call Offs 	
Have you received the appropriate financial authority?	▪ Refer to the BBC Financial Guidelines OR your Financial Controller/Manager	
Have you identified / established a charge code?		
Will payments be a lump sum, stage or milestone payments?		
What are interdependencies?		
Customer / Supplier / 3rd party?		
How will this project relate to other BBC technology projects?		
What will happen if there is a delay in the project? What are the cost implications?		
Will the services / goods to be supplied require connecting / attaching to BBC Network(s) in any way?	▪ Network Policies	
What approvals will be required?	<ul style="list-style-type: none"> ▪ Change Management ▪ Information Security Policy ▪ Form for Gathering Information Security Requirements 	
What standards apply?	<ul style="list-style-type: none"> ▪ Information Security Policy ▪ Network Standards 	
What type of data is involved		
Will you require registration under the DPA?	<ul style="list-style-type: none"> ▪ Data Management ▪ Information Security Policy 	
Any data collection / retention of information involved?	<ul style="list-style-type: none"> ▪ Policies for Third Parties ▪ Hosting BBC Data on external ISPs 	
Will supplier / 3rd parties hold any BBC data?	▪ Legislation affecting Data e.g. DPA, FOI Act)	
Will BBC hold 3rd party data?		
Any data security concerns?	▪ Contact the Information Security Team	
Will your service / goods require support / maintenance?		
Who will provide support / maintenance?	▪ Maintenance and Support	

	<ul style="list-style-type: none"> ▪ Hosting BBC Data on external ISPs ▪ Baseline security for Third parties 	
What support / maintenance will be required?	Should identify what support will be provided and to what levels.	
If not supplied by an existing BBC supplier under existing agreements, what access / equipment will be required to enable the support process?		
What is the impact of your project on the BBC in terms of broadcast and business continuity?	<ul style="list-style-type: none"> ▪ Broadcast and Business Continuity There is a separate B&BC checklist for investments available on the above site. 	
Do you need to build resilience into your solution?		
What are your insurance requirements?	<ul style="list-style-type: none"> ▪ Seek advice from BBC Insurance and Legal Division 	
Will the purchase alter the BBC's current insurance cover levels or risk profile?	<ul style="list-style-type: none"> ▪ Refer any questions to BBC Insurance 	
What additional insurance will be required from your supplier?	<ul style="list-style-type: none"> ▪ Check the BBC standard Terms of Trade. 	
Has BBC Insurance been notified of any changes to the project?		
Have you Identified the specific technical requirements for your type of project?		
Will the project require technical improvements / refresh during its life cycle, or the life of the contract?	<ul style="list-style-type: none"> ▪ Seek advice from your Technology Representative / Controller 	
Is the project longer than 18 months?	<ul style="list-style-type: none"> ▪ Will need to comply with Technology Strategy 	
Is your project going to set policies and/or standards not currently specified in DQ?	<ul style="list-style-type: none"> ▪ Seek advice from either your Technology Representative / Controller OR from the Technology Advisors 	
Have you identified all the relevant Technical Polices and Standards?	<ul style="list-style-type: none"> ▪ List of Technology Areas and Technical Advisors 	
	<ul style="list-style-type: none"> ▪ List of all DQ Policies 	
	<ul style="list-style-type: none"> ▪ List of all DQ Content 	
	<ul style="list-style-type: none"> ▪ Technology Reference and Guidance on the Technology Group Site. 	
Other		
Refer to the Director of Policy to use the brand for marketing any delivered product	See Commercial Policy Guideline	
Refer to the Director of Policy all potential fair trading issues	See Commercial Policy Guidelines	