

Planning and Delivering



Your Facilities Project

Projects come in many different shapes and sizes, all with varying levels of skill and health & safety requirements.

All construction related work must be developed and carried out in accordance with the Construction Design and Management regulations 2015.

In this presentation we will identify best practice for your Project delivery and the requirements of the CDM regulations that will apply.



References to the CDM Regulations within this presentation are made from the HSE Document [Managing health and safety in construction. Construction \(Design and Management\) Regulations 2015. Guidance on regulations L153 \(hse.gov.uk\)](https://www.hse.gov.uk/l153/)

There are Five main steps to consider

1. Planning and Budget

These go hand in hand, what is the extent of work we can afford and when would we like the work to be completed.

2. Scope of Work and Design

Produce a detailed description of the work in writing and include sketches with dimensions, hand drawn is ok, but photocopy it into the Scope of Work and include any technical specifications.

3. Choosing a Contractor

Carry out checks on their Competency, experience and qualifications. Can they provide evidence of similar previously completed Projects. The same applies if you choose to do the work yourselves.

4. Managing the Project

Decide who will manage the work, with regard to safety, quality and programme.

5. Care and Maintenance

Acknowledge that the completed works will need periodic maintenance and that there will be sufficient funds available to carry it out.

Step 1 Planning and Budget

- **Estimate the costs for the extent of work you are considering**

You may wish to engage with a Contractor to discuss the likely costs and timescale for your Project. These are informal discussions and any costs discussed are indicative and not binding until a formal estimate has been provided by the Contractor.

- **Time scale**

Your timescale or Programme must be practical and achievable, so that the Contractor has sufficient time to manage the Project safely.

Ensure your Programme accounts for material purchase lead times.

CDM Regulation L153 Guidance 4,5 para 31 (c)

Guidance Note

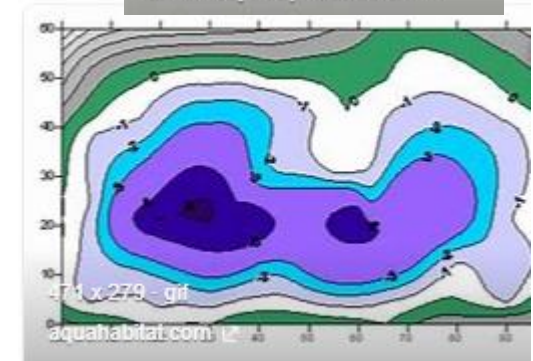
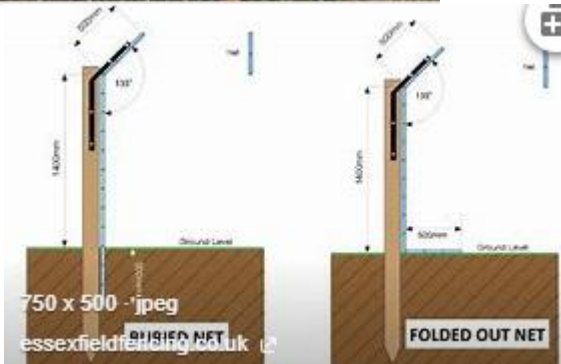
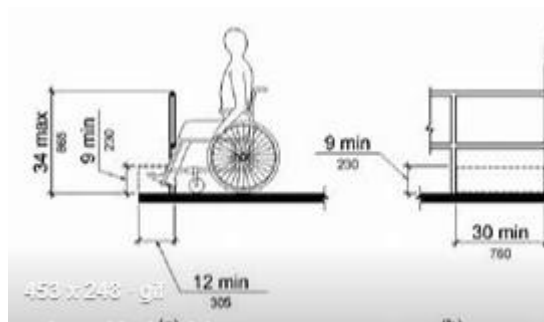
Due to the pandemic many materials are on long delivery terms and additional costs may also be likely

- **Access and Availability of the Site**

Ensure that access to the site is available during the proposed Programme and that any footpaths or roadways, whether private or public, can be re routed around the Construction area so that access to the Construction site is restricted to the Works team only. A safety zone must be created around the work site to restrict access.

Step 2 Develop a Scope of Work

- **The Client must produce a clear scope of work which shall include;**
- **A detailed description of what is to be constructed.**
- This should include sketches and a clear description of your expectations. The Contractor may propose changes to the design or technical requirements. If these are acceptable to you, then the Scope of Work must be amended and included in the final contract documents.
- **Location of the planned works** Clear indication of the position on site of the Works



Step 2 Develop a Scope of Work

What Contractors Need From You:

- **Clear idea of your requirements** – Good, clear communication, in the form of a Scope of Works, of your needs as a client is the key to a successful project. This may include a sketch and description with any technical specifications.
- **Site specific Conditions** You must inform the Contractor of any site conditions that may affect his working methods or that may be a Hazard during the works. This will include any known buried services, water, gas or electricity, overhead powerlines or buried structures.
CDM Regulation L153 Guidance 4,5 para 43
- **Payment Schedule** – Depending on the size of a project or the scope, a mobilisation payment may be required to fund materials or any initial purchases and stage payments may be required. How and when the stage payments and final payment will be made must be agreed before the Contract is placed. You must agree at what stage of the works a payment will be due. The final payment may need to include the provision of ‘as built’ drawings, Maintenance and Care information.
- **Duty Holders.** You must inform the Contractor of any other people involved with the Works, such as Designers and Ground Works Contractors. If you specify and describe the work yourself than you are considered as the Designer.
CDM Regulation L153 Guidance 4,5 para 40
- **Site visits** – Contractors will often need a site visit ahead of providing a quotation, this is often a good opportunity to meet with each other and build a relationship.

Step 2 Develop a Scope of Work

What Clients Must Do.:

- **Appoint Duty Holders.** When appointing a Contractor or Designer the Client has a responsibility to take ‘reasonable steps’ to appoint Contractors or Designers that have suitable experience , skills and knowledge to carry out the work in a way that secures health and safety.
CDM Regulation L153 Guidance 8 para 58 - 65
- **Notify the HSE if the Project falls with the ‘Notifiable’ criteria.** A Project is ‘Notifiable’ if it falls into the Criteria that the Project will ‘Last Longer than 30 days and have 20 workers simultaneously at any point in the Project, OR if the Project is to last more than 500 person days.
CDM Regulation L153 Guidance 6 para 47
- **Pre Construction information.** Include information on underground services, overhead power lines, buried structures, information on structures if they are to be demolished (do they contain asbestos), or any other existing site hazards that may affect the Project Works.
CDM Regulation L153 Guidance 4,5 para 42

Step 3 Choosing a Contractor

What Contractors must provide

Pre Contract Award

- **Clear Bid Submission.** The Contractors bid must confirm that they have included everything you requested in your Scope of Work, if not they must identify what is excluded. They must confirm their programme (timescale) for the works.
- **Construction Phase Plan.** The Contractor must provide a written plan explaining how Health and Safety will be managed throughout the Project.
CDM L153 Guidance 12 para 111
- **Evidence of their Capability.** The Contractor must provide you with suitable evidence of their capability and Competence. Examples of previously completed work should be verified. You must be satisfied that the evidence is satisfactory. Where trade associations are referenced, it is good practice to contact the association to confirm the Contractor membership / accreditation is current and up to date.
CDM L153 Guidance 8 para 58 – 62

Step 3 Choosing a Contractor

Things to Consider

Competency: If in doubt, ask to see examples of previous works. A trustworthy contractor will have an up to date website with details of previous projects and a list of industry accreditations.

Insurance: Ensure the contractors you appoint are fully insured. As a general rule you would expect a contractor to have up to:

- £10m Employers Liability Insurance
- £10m Public Liability Insurance
- £1m Professional Indemnity Insurance

Certification: Ensure that you see all certificates for any specialist operational employees ahead of works, and that they are all in date.

Cost: Ensuring you have the best value is important. Value important – not always cheapest

Ask Contractors to complete the Supplier Evaluation Questionnaire Template Provided.

Step 3 Choosing a Contractor

Accreditations to look out for:



If a Contractor states they are accredited to an Organisation it is worth checking with the organisation that his accreditation is still valid.

Step 4 Managing the Works

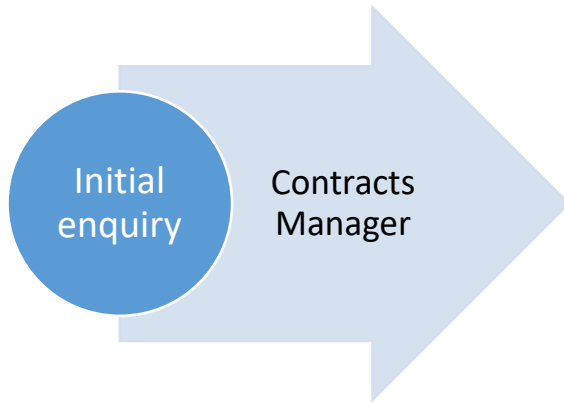
- **Make suitable arrangements for managing the Project.** You must ensure that reasonable steps are taken to manage the works safely. The Contractor must have in place a safe system of work, described in their Construction Phase Plan, you must be confident that the Contractor is compliant with his plan and the plan is suitable once the works have commenced.
- *CDM Regulation L153 Guidance 4,5 para 30 to 34*
- **Reporting Dangerous Conditions** Everyone has a duty to report dangerous conditions that encounter on site and the Contractor must be notified immediately and work must stop until the conditions are made safe.
- *CDM Regulation L153 Guidance 8 para 68*
- **Managing the Site and Construction Hazards.** The Contractor must develop suitable Risk Assessments to identify the Hazards in their proposed construction methods and the site Hazards of which you previously made them aware. The risk assessment will identify what mitigation measures they will put in place and as a last resort what PPE will be worn in general and for specific operations.



Step 4 Managing the Works

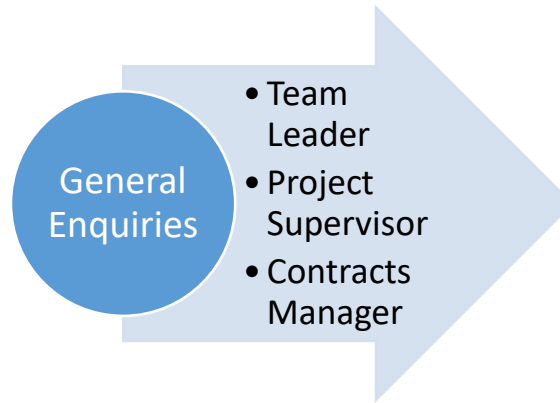
Roles and Responsibilities

Contracts Manager



A Contracts Manager will be your first point of call when obtaining quotations. They will generally attend initial site visits to discuss the project scope and will draft and send the quotation accordingly. They will have extensive industry knowledge and will be able to offer the best advise on how to achieve your desired goals.

Team Leader | Project Supervisor



The Team Leader or Project Supervisor is responsible for all operational staff onsite and will have been thoroughly briefed by the Contracts Manager on the project details. They will be on site each day and will oversee the project to ensure health and safety standards are being met and that works are being run in accordance with the Risk Assessment and Method Statement.

Operational Staff



Operational Employees support the Team Leader or Project Supervisor in carrying out the works. They will be multi skilled with previous experience and will be on site every day.

Step 4 Managing the Work

Snagging and Handover

After the work is complete, be sure to visit site with the Contracts Manager or Project Supervisor for a “**Sign off Meeting**”.

Things to consider

- **Project Scope** – Have all of the project requirements been completed as quoted for?
- **Work Quality** – Is the work to a good standard and comprised of the agreed materials?
- **Site cleanliness** – Has the working area been left in clean and tidy manner?
- **Site safety** – Is the site/structure safe and ready to be used?
- **As Built Information** – has the Contractor provided you with as built drawings and information ?



Step 5 Care and Maintenance

Care and Maintenance

The contractor must be instructed to provide Care and Maintenance information that will allow you to keep the ‘works’ in a safe condition. This method to carry out the maintenance operation must take into account health and safety. This will include safe access, materials and equipment that may be required.



Design

You may consider that the work you are developing does not need a Designer, however the simplest of works will have an element of design.

As described in section you are responsible for appointing suitable duty holders , this includes the Designer.

You may consider that with the type, complexity and nature of work to be undertaken, you or members of your organisation, have the capability to administer the Designer responsibilities. This may be acceptable, but first ensure you have the competency to deliver the design. If not appoint a suitable qualified and experienced consultant.

You may include the Contractor in the Design process, before doing so you must have evidence that they have experience and knowledge of the works.

Health and Safety File

This is simple, but invaluable, file where building or site information is held. This will include site plans, site hazards , position of known services and maintenance information. As built information from a project must be copied into this file for future reference. The file should be made available for any future contractor.



Things to consider

Ecology: Ahead of any works taking place, European Protected Species such as Bats, Great Crested Newts and otters, as well as species protected under Domestic Law such as Badgers, Reptiles, Water Vole, White Clawed Crayfish and all wild birds must be considered. Certain habitats can't be disturbed during certain times of year and other may only be worked on under licence.

Tree Preservation Orders/Conservation Areas: Some trees are protected by a Tree Preservation Order whilst others can fall within a Conservation Area. Guidance can be obtained from the Local Council and in the Forestry document [Tree Felling - Getting Permission - web version.pdf \(publishing.service.gov.uk\)](#)

SSSI: Some areas are classified as a Site of Special Scientific Interest which can often cause access restrictions and may demand altered/bespoke working methodologies.

Planning Permission: Consultation with the local council for any structure such as store rooms or fishing huts is essential prior to appointing a contractor. Failure to comply with planning can result in compulsory demolition and or fines.

Handy Tips | Refurbishment of platforms and pontoons

There are many materials available that can be used when restoring or building new platforms and pontoons

- **Recycled Plastic** – Rot resistant and great when installing directly into water. Cost is similar to timber but harder to work with so installation costs can sometimes increase.
- **Anti-slip Grip Boards** – Great for use on pontoons over water. Although more expensive, the anti-slip material helps to ensure safety.
- **Hybrid Construction** – For a more aesthetic approach, why not combine timber and plastic (plastic supports with a timber frame can last for many more years than basic pressure treated timber structures).

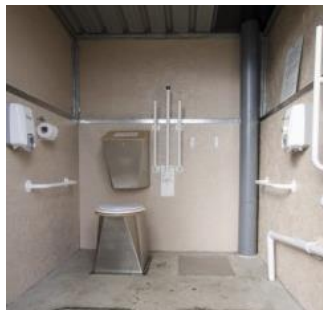


Have you considered Composting Toilets?

Benefits:

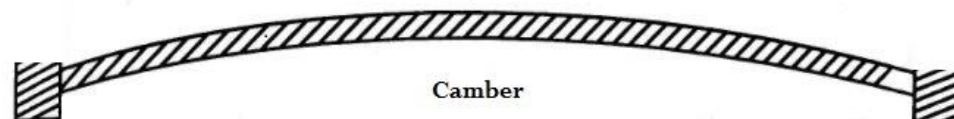
- Quick to install
- Do not require mains or running water
- Very low maintenance
- Can be installed in difficult to reach areas
- Low odour
- Within most contractors capabilities
- No mains electric required
- No chemicals

**Ensure the local authority are consulted
RE planning permission**



General things to consider

- **Aggregate** – Ensure the contractor is supplying British Standard material throughout works
- **Transportation of INNS** – The transportation of Invasive Non Native Species such as Japanese Knotweed is common during footpath construction, especially when using existing material stored on site from previous works.
- **Installation** – Ensure that a good subbase and drainage/soakaways are considered. If you are experiencing boggy ground then this can often be cheaply rectified using shingle, Type 3 recycled concrete and perforated drainage systems.
- **Camber** – Ensure the footpath is slightly higher down the middle to ensure water runs off either side.
- **Suitable topdressing** – Ensure a good topdressing is supplied and that it is rolled and compacted well.



“When planning your project, consider how you will maintain it once the work is done”

- **Annual maintenance regime** – Do you need to engage with local volunteers and club members to help?
- **Work parties** – A monthly work party with club members can be a good way to keep on top of shrub maintenance, fencing repairs, hedge planting in the winter and painting.
- **Contractor engagement** – With some projects, the maintenance tasks can be too large for volunteers and club members to carry out.
- **INNS Treatment** – Some Invasive Non Native Species such as Himalayan Balsam, Japanese Knotweed, Giant Hogweed take several treatments over time.



**Good luck on your
next project!**

**Mark Owen
Head of Fisheries
Angling Trust**