



South Cumbria &
North Lancashire Branch

Joint meeting 16th January 2020



South Cumbria Occupational
Health & Safety Group

Topic: *CDM – best practice for small and medium sized businesses Clients and Designers*

Speaker: James Woolgrove, Director, Heritage Health & Safety

Venue: *The Netherwood Hotel, Lindale Road, Grange-over-Sands, Cumbria LA11 6ET.*

Jim Tongue, Chairman, *South Cumbria & North Lancashire IOSH Branch*, welcomed *IOSH* and *SCOHS G* members to the meeting. He then introduced James Woolgrove, who is well known to members, and has a wide range of experience and knowledge of how to comply with the *CDM Regulations, 2015* on small building and renovation projects, particularly on heritage sites.

James introduced his talk by saying that he planned to cover the following topics:

- An overview of the main aims, definitions and requirements of the *CDM 2015 Regulations*.
- Project planning – theoretical, Client's expectations and the reality.
- *HSE's* *CDM* priorities.
- Information needed for *CDM* project planning. What information is needed? How should it be gathered and shared?
- Use of new technologies at the design stage of a project.

James reminded members that all construction work was covered by the *CDM Regulations, 2015* because they provide a scalable framework that is applicable to all types of construction work including: new build, renovation, extensions, large and small projects.

He explained that these Regulations set out the requirements for managing health and safety on construction projects. They require all construction projects to have an effective safety management system for managing risks embedded in the project. It should include:

- Appointing right people at the right time for key roles such as the Principal Designer and the Principal Contractor
- Providing relevant information, instruction, training and supervision from the planning stage until project completion.
- Ensuring that:
 - The Client, the Principal Designer and the Principal Contractor have an efficient communication system that is based on cooperation and coordination.
 - There is consultation and engagement with workers so that they understand any constraints on site and the work that they are being asked to do.

James then provided members with some useful *CDM* definitions during discussions about the overlap of roles under the *CDM Regulations* and the reluctance of Designers and Contractors to accept that they are the Principal Designer or the Principal Contractor.

Helpful CDM Definitions:

Client: Any person for whom a construction, renovation or refurbishment project is carried out.

Construction work: Any building, civil engineering or engineering work undertaken for a new build, renovation or refurbishment project.

Project: All construction work including planning, design, management or other work involved in a project until the end of the construction phase.

- Principal Designer:* The person who plans, manages, monitors and coordinates the design stage of the project. The function of coordination is an integral part of all construction projects.
- Designer:* Any person (including a Client, Contractor or other person referred to in these Regulations) who during the lifetime of the construction project prepares or modifies a design, or, arranges for, or instructs, any person under their control to do so.
- Design:* This process includes producing drawings, design details, specifications and bills of quantities (specification of articles or substances) for the project and calculations needed to underpin the design.
- Principal contractor:* The person who plans, manages and monitors the construction phase of the project. Their role includes - coordinating health and safety systems, organising cooperation between contractors, ensuring that all relevant health and safety legislation is adhered to, overseeing site inductions, security and welfare, liaising with the Principal Designer, consultation and engagement with workers, Client, and Principal Designer.
- Contractor:* Any person (including a non-domestic Client) who, as part of their business carries out, manages or controls work during the construction stage of the project.

James then demonstrated how people's perception of the 'life' of a construction project depends on their role within the project. In theory it is straight forward:

Client → Designer → Principal Contractor and team → job done.

A straight forward process with no glitches and a quick completion date.

In practice this rarely happens. The Principal Designer often has very little contact with the Principal Contractor until the planning process is almost complete. The original design is frequently over budget so that it is necessary to appoint a cost consultant and/or it includes practical problems such as services being routed through inappropriate/inaccessible areas.

James explained that *HSE* are aware of these problems. Their priorities include:

- Persuading Clients and their advisers that investment in planning at the pre-construction stage is cost effective.
- Working with Principal Designers to establish good practice.
- Ensuring that the benefits of digital technologies are realised during the design and planning stage to achieve more practical designs early on in the planning process eg 3D modelling of the proposed site to identify most efficient routes for services etc...

However, even though *HSE* organises webinars and other training sessions they find it difficult to disseminate relevant information to Clients and the Principal Designers responsible for small and medium sized construction projects.

James reminded members that, when Judith Hackett was *HSE's* Chair, she emphasised that the Principal Designer of construction projects ought to be the coordinator of all relevant project information and that health and safety requirements should be an integral part of project planning from the start, not a late stage 'bolt-on'.

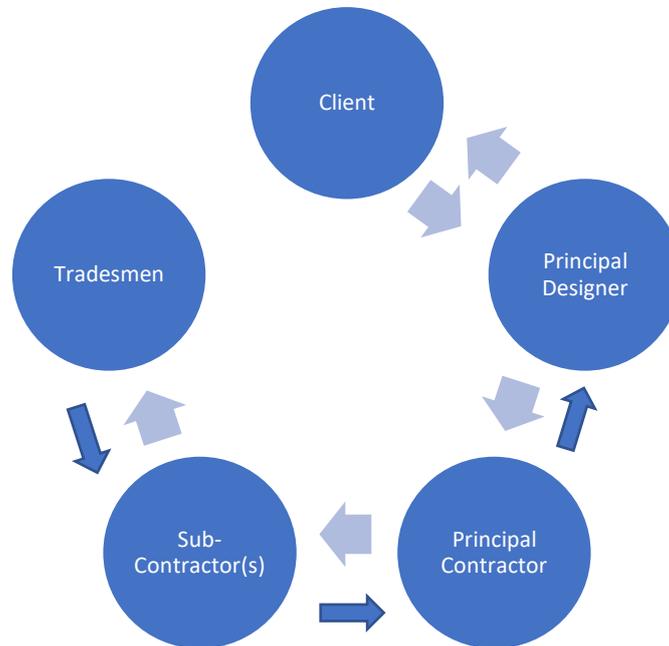
He said that successful completion of construction projects depended on having the right people (with relevant skills, knowledge, training and experience) in the right place, at the right time.

James then divided members into groups and asked them to make a list of the planning stage information that would be needed at if members were designing an extension for the *Netherwood Hotel*. This led to some useful discussions about information needed at the planning stage. Group recorders then reported back to the main meeting so that members could share their suggestions with one another.

James then explained that the key to successful construction projects was to ensure that comprehensive, relevant information was available for the project planning stage and for subsequent project stages – that the right people had the right information at the right time.

He stressed that it is important the Principal Designer is made aware of key information such as: site characteristics, site limitations, specifications for the job, budget, proposed timescale etc.... before work on the project design is started.

Ideal construction project information exchange and communication



James explained that there were several construction project management systems available for Designers to use such as HASCON, that was originally developed by ICI as a structured, systematic examination of a complex planned or existing process or operation in order to identify and evaluate problems that may represent risks to personnel or equipment.

He said that he had found the *Construction Industry Training Board's (CITB) form GA23* was a good starting point for planning smaller projects because it allowed relevant information to be stored in an accessible format that could be viewed on tablets. See: <https://www.citb.co.uk/>

James concluded his presentation by showing members some examples of modern technology that can be used to make the design stage more efficient and accurate.

Gary then thanked James for giving members such a helpful interesting overview of the problems associated with running CDM compliant construction projects and presented him with a small token of our members' appreciation.

He then encouraged members to network with one another and James over tea and coffee.

Related HSE web site links:

Overview of CDM Regulations 2015: <https://www.hse.gov.uk/construction/cdm/2015/index.htm>

Summary of duties: <https://www.hse.gov.uk/construction/cdm/2015/summary.htm>

Legal requirements of CDM: <https://www.hse.gov.uk/construction/cdm/2015/legal.htm>

CDM - Frequently asked questions: <https://www.hse.gov.uk/construction/cdm/fag/index.htm>