Contract Specification



- Title:ISO 11 Incinerator life extension project. Project
Management.
- Project: BC22-004
- **Date:** 14/03/24
- Author: Anthony Clarke
- **Owner:** John Nixon
- Client: The Pirbright Institute
- Version No: 1

1 Document Control

1.1 Document Location

N:\Capability Projects\Private\Operational Projects\BC24-001 ISO 11 Incinerator life extension\Procurement\Project Management

1.2 Revision History

Version	Date	Details	Author
1	14/03/24	First Issue.	AC

1.3 Approvals

This document requires the following approvals.

Name	Title	Version	Date
Anthony Clarke	Capability Operations Projects Manager	1	30/04/24
John Nixon	Pirbright Finance – Procurement Buyer	1	30/04/24

1.4 Issue History

In addition to the approvers, this document has been issued to:

Name	Purpose Version D		Date
Part of Contracts Finder Invitation to Tender.	Part of Contracts Finder Invitation to Tender.	1	30/04/24

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3 Introduction

3.1 Document Purpose

The primary purpose of this version of the document is intended to:

- Give details of works required to potential suppliers so they can submit a quotation and programme of works.
- Fulfil the client brief and pre-construction information aspects of construction design management (CDM) regulations 2015.

For comparison only, this version of the document could be aligned with Royal Institute of British Architecture (RIBA) Plan of work 2014 Stage 1 (Preparation & Brief).

As the project progresses, this document will be updated to contain more detailed information on the proposed design and delivery of the works.

Should changes to the scope occur, these will always be recorded in meeting notes and the scope document will be updated and re-issued if appropriate.

This document details the envisaged requirements of the works but should not been seen as restrictive.

3.2 Summary Description of works

The contract is for a single supplier to provide Project Management to the Incinerator life extension project.

3.3 Specification Type

The specification for this contract will be of a performance specification type.

3.4 Contract Duration

Funding for project in place from start of Financial Year 2024-25 until end Financial Year 2025-26.

3.5 Contact Details

The primary contact for queries relating to this Invitation to Tender process is:

John Nixon Procurement Buyer The Pirbright Institute <u>Procurement.department@pirbright.ac.uk</u>

3.6 Location of Works

The Pirbright Institute Ash road, Pirbright, Woking, GU24 0NF.

4 General requirements

This section describes the general requirements related to delivering these works at The Pirbright Institute (Pirbright).

4.1 Health & Safety Requirements

All works related to this specification should be performed in line with site Health & Safety (H&S) rules and the Health and Safety at Work Act 1974.

The following documents are attached in Appendix A and detail the site rules to be considered when tendering and when works are performed on site:

- RISK-SOP-7: Management of Contractors
- R&A-COP-3: Contractor Site Handbook
- R&A-FORM-4: Pirbright Site Rules Overview
- EMS-WI-085: Permit to work
- EMS-FORM-100: Point of Work Risk Assessment (POWRA)
- EMS-FORM-098: Permit to Work Part A, Part B & Part C
- EMS-WI-82: EMS Lockout/Tagout Work Instruction
- EMS-FORM-126 RAMS for Planned Work on Bio Containment Systems (PWBCS)

If required, further training on the procedures detailed in the above documents can be given on site.

The above documents detail Pirbright's management of H&S for construction works, the following sections highlight aspects requiring particular attention.

4.1.1 Risk Assessments & Method Statements

Any works on the site must be preceded by a risk assessment and method statement (RAMS). These must be submitted to the Pirbright responsible person at least 5 days in advance of the works.

RAMS must be specific to the task and date of the works and should include a detailed step by step method.

RAMS are never "approved" but will be "reviewed" by Pirbright personnel, and feedback will be given. A permit to work will not be issued if the RAMS are deemed to be inappropriate.

Where appropriate, RAMS should be accompanied by drawings to help explain their context.

Details of the competent person performing works and their relevant training records should be included and/or referenced in the RAMS.

4.1.2 Tools and Equipment

Contractors should always provide their own tools and equipment they require to complete their works. Pirbright will not issue equipment to contractors.

Equipment which must be supplied by the contractor is as follows. The equipment must be suitable for fumigation or can be disposed of. All items of test equipment must have a current calibration certificate.

Equipment used by contractors should be in good working order and comply with all relevant legislation.

Electrical equipment should be PAT tested.

Equipment brought into Pirbright's restricted areas will need to be suitable for fumigation or disposal.

Where appropriate calibration, inspection and testing certificates of equipment being used should be issued to the responsible person before works commence.

4.1.3 PPE

Contractors should provide their own personal protective equipment (PPE). PPE used should be suitable for the works and specific type/specification of PPE should be detailed in the RAMS.

4.1.4 Barriers and Warning Signs.

Where necessary, areas of works must be cordoned off with suitable barriers and warning signs to deter unauthorised pedestrian/vehicle access during work activities.

Contractors must provide their own barriers and warning signs.

4.1.5 Access Equipment

Contractors should arrange scaffolding required. Pirbright preferred suppliers can be utilised. Contractors should ensure that scaffolding is inspected and tagged on a weekly basis once erected.

Contractors should provide all temporary access equipment required such as ladders. The equipment should be in good working order and should be of a class 1 (industrial) certification standard.

Contractors should provide mobile access equipment and driver/operator required. The equipment should be in good working order and copies of Inspection certificates (less than 12 months old) should be issued to the Pirbright responsible person before works commence. Copies of qualifications/training records/licenses for drivers operating the equipment should be issued to the Pirbright responsible person before the works commence.

Pirbright will not issue any of the above access equipment to contractors.

4.1.6 Lifting Equipment

Contractors should provide their own lifting equipment and driver/operator if required to complete works detailed in this specification. The equipment should be in good working order and copies of Inspection certificates (less than 12 months old) should be issued to the Pirbright responsible person before works commence. Copies of qualifications/training records/licenses for drivers operating the equipment should be issued to the Pirbright responsible person before the works commence.

Pirbright will not issue any of the above access equipment to contractors.

4.1.7 Equipment Certification

Where appropriate, evidence of inspection / testing / commissioning of equipment supplied or used for installation works should be provided.

4.1.8 Permits

All works performed by contractors require a permit to work.

See EMS-WI-085: Permit to Work WI and EMS-FORM-098: Permit to work (Appendix A) for further details.

Note: The application of the safe system of work and permits to the construction works with relevant members of Capability EMS as advised by the project sponsor in advance of works commencing.

All works affecting Pirbright Bio-Containment systems must be carried out under EMS-FORM-126: RAMS for Planned Work on Biocontainment Systems (PWBCS).

4.1.9 Isolations

As detailed in the EMS Lock out/Tag out Work Instruction, Isolations must be performed under permit by Pirbright maintenance technicians and should be witnessed by the contractor performing the work who then add their own locks to the isolation.

4.1.10 Asbestos

The site asbestos register is available on request.

If any suspected asbestos is identified during the works, then works in the area should be stopped and it should be highlighted to the site contact, who will arrange sampling to take place.

4.1.11 Emergency Procedures

If an emergency event is discovered, such as a fire or medical emergency, the site gatehouse should be contacted for assistance on the emergency extension number 1000 or on radio channel 1.

On discovering a fire, the area should be evacuated, and all personnel should go to the fire assembly point. If safe to do so, fire alarm call points should be activated on the way out of the area.

In the event of a fire alarm, works should stop immediately, and contractors should make their way to their fire assembly point (to be given by the project manager).

4.1.12 Accident Reporting

Accidents should be reported to the Pirbright responsible person

4.1.13 CDM Regulations

The contractor will comply with the Construction (Design and Management) Regulations currently in force, where applicable.

4.2 Security and Site Access Requirements

RISK-SOP-7: Management of Contractors (Appendix A) details site access requirements.

The following sections highlight aspects to be considered.

4.2.1 Photos

Photos on site can only be taken with prior agreement from the Pirbright responsible person. Any photos taken should not include any faces or vehicle number plates.

4.2.2 Site Access

To gain access to site, all contractors must have visitor forms raised for them by their site host before arrival on site, therefore a full names and dates of all personnel attending site must be provided at least 24h in advance.

Contractors must report to the gatehouse and present photo ID each time they access site. Photo card driving license and passport are the only forms of ID that will be accepted.

4.2.3 Site Inductions

An additional 30 min video induction and associated test should be completed by contractors working within any restricted areas.

4.2.4 Approved Contractors and Escort Requirements

Contractors must be fully escorted by Pirbright personnel unless there are approved contractors within the team.

Therefore, it is recommended that an appropriate number of contractors in each team should complete an institute security check (performed by Agenda). The cost of this is covered by the institute. This process can take up to 2 weeks to complete. To initiate this process, provide full names and an email address specific to the person to the site contact.

1 approved contractor may escort up to 3 unapproved contractors if working in the same area.

All contractors, including approved contractors must be escorted within restricted areas.

4.2.5 Vehicle Movements

Vehicle movements on site roads is subject to a speed limit of 10 mph which must be observed at all times extra caution should be taken by drivers on site roads due to shared use of roads by pedestrians, bicycles and vehicles.

Vehicle access to the site is through the main entrance at the north boundary of the site.

4.2.6 Welfare Facilities

There are toilets and a site canteen that can be utilised by contractors whilst on site.

4.2.7 Working Hours

Contractors will be able to access site from 0700h – 1900h Mon - Fri. works outside of these hours need to be arranged with the Pirbright Responsible Person.

Consideration should be given to the use of temporary lighting requirements if working in poor light.

4.2.8 Construction site management

The construction site should be prepared and managed by the principal contractor delivering the abatement equipment work package.

This construction site should be separated from the wider Pirbright site via barriers etc.

Note: the principal contractor is expected to arrange any equipment required for construction site management such as track way, barriers, site vehicles etc. as part of their works.

Access to the construction site should only be to people who have completed a construction site induction.

This construction site induction should be created by the Pirbright project manager and agreed with the principal contractor.

This induction will initially be delivered by the Pirbright project manager to the principal contractors and internal personnel after which the induction can be delivered by the principal contractor.

Note: The construction site management plan should be agreed with relevant members of Capability EMS as advised by the project sponsor in advance of works commencing.

4.3 Bio Safety Quarantine and Decontamination Requirements

4.3.1 Quarantine Requirements

Personnel and equipment working within restricted areas will be subject to a 3-day quarantine period. During this period, they or their equipment mustn't visit zoos, farms, safari parks or other locations likely to house susceptible species of animal.

Further details will be given in the restricted area induction.

4.3.2 Fumigation Requirements

Equipment used for the works within the restricted areas will need to be fumigated out, this is usually performed overnight so allowances must be made for collection of this equipment the next day or on the next visit. This also means that equipment taken into the restricted area should not include absorbent materials as these cannot be fumigated out, this often requires straps / packaging materials to be removed from equipment.

This also means that paper cannot be removed from restricted area (arrangements to scan and e-mail paperwork can be made in advance).

4.4 Design Requirements

4.4.1 Design Responsibility

Detailed design work for all mechanical, electrical, civils and controls works should be carried out for all works. Final design responsibility will always be with the principal designer as appointed by the client.

4.4.2 Standards and Specifications

All equipment supplied an installed should be manufactured, installed, tested and commissioned in accordance with all applicable national and international standards, manufacturer's instructions. These should be referenced in any quotation documentation and RAMS documents.

4.4.3 Design Review & SWIFT Analysis

The proposed design should be reviewed with appropriate Capability EMS personnel. The Principal Designer and any appropriate sub designers must attend and provide any information requested in advance.

The Project Manager shall arrange for a full DQ exercise to be undertaken in respect of all detailed designs submitted as part of this project.

4.4.4 Documentation

The common platform for all project documentation between contracting teams and the client (Pirbright) will be the cloud-based construction management software, "Procore". System familiarisation and access will be provided to the Project Manager following appointment.

The following documentation should be issued before works commence:

- Design Drawings
- Control Philosophies
- Design calculations, or statements confirming they are not required.
- Relevant safety certificates for equipment being used to perform the works.
- Contractor Risk Assessment / Method Statements.
- Scopes / schedules of works
- Any lifting plans.
- Any waste storage / disposal plans.
- Other statutory documentation, as required.

4.5 Completion of works

The following sections detail what will constitute the completion of the works.

4.5.1 Inspection and Testing

Any records relating to the inspection, testing and commissioning of an installation should be provided to the project manager. Were appropriate, witnessing of these by a member of the Pirbright engineering team may be required.

4.5.2 Commissioning, Verification & Validation (CVV)

Commissioning of equipment must take place to prove that requirements as detailed by this scope of works have been successfully met. CVV requirements must be drafted during the Design development phase of the project and finalised during the detailed design phase of the project.

4.5.3 End Users Training

Appropriate end users training must have taken place to a level that the end user feels they can successfully operate and maintain any equipment.

4.5.4 Snagging Surveys

All works, they must be visually inspected by an appropriate member of the institute engineering team. Any snags identified shall be listed on a project snagging schedule by the project manager and reviewed with the principal contractor and project sponsor to agree where responsibility for remedial works lies. Performance and documentation defects/deficiencies can also be recorded and traced on this schedule.

4.5.5 Project Information File (PIF)

Final handover to the Pirbright operations team includes the completion of a Project Information File (PIF). This includes information from the contractors. Details of what is to be included in the PIF are shown in the PIF check sheet included in Appendix B.

All project documentation is to be handed over using Pirbright's document naming convention

A full list of assets disinvested and new assets will be provided in accordance with Pirbright's asset naming convention

Pirbright's document management system is the cloud-based "Procore" system and this will be used for the sharing of all design information, handover, etc to ensure traceability.

The Following documents apply:

EMS-WI-230 - Technical Library Principles of Use

- Appendix 1 EMS Document Naming Convention
- Appendix 2 Procore Disciplines

EMS-WI-403 - Procore User Guide

• Appendix 1 - Procore Superuser Guide

EMS-WI-329 - EMS Asset Convention

- Appendix 1 EMS Asset Naming Convention
- Appendix 2 TOPdesk Asset Import Template

4.5.6 Operations Handover Workshops

Operational handover workshops should take place between once the activities in the sections above have been completed, this should be facilitated by the Project Manager and should involve the following people:

- Capability EMS Leader Operations and Maintenance
- Capability Operations Projects Manager
- Appropriate Capability EMS Specialist Equipment Owners
- Capability EMS BMS Owner
- EMS Technical Coordinator
- Maintenance Supervisor(s)
- Science Users (if applicable)
- IT representatives (if applicable)
- HSBS representatives (if applicable).

All project and Handover documentation will be accessed on "Procore", the cloud-based system which Pirbright use for their document and drawing management.

All documentation for review will be uploaded to Procore and will be organised according to Pirbright's stated document naming convention, which is attached in ITT Appendix E1 -E.

4.5.7 Project Completion Sign Off

Once all the activities in the above sections have been completed, then a project completion sign off sheet should be signed by those that attended the handover workshops.

This marks the completion of the project and any new equipment installed is now managed by Capability EMS Operations and Maintenance.

4.5.8 Waste Management

A project will not be signed off if waste from the works remains on site, contractors must dispose of waste from the works via appropriate means.

Pirbright waste streams must not be used without prior agreement.

It is envisaged that no Pirbright waste streams will be used for the delivery of these works.

All waste spoil created by the works must be removed from site by the contractor and disposed of in an appropriate manner. However, this must be confirmed in writing with the Pirbright Biosafety team as spoil from some areas of site must be stored and/or sampled on site before disposal.

Any waste skips/bins/collections must be arranged by the contractor.

4.6 Commercial Requirements

Quotations will be gathered by the contract Projects Manager. Orders can only be placed with approval from the Project Sponsor (as budget holder).

Raising POs and co-ordination of any competitive Request for a Quote process will be by EMS Administration.

Contractor capability should be reviewed before works are awarded. This may involve but is not limited to:

- Completion of Supplier Pre-Qualification Questionnaire
- Assessment of the quality of Request for a Quote submission via a scoring matrix
- Issuing of relevant company certification (such as ISO 9001, safe contractor etc.). Where
 certification is not present, documentation showing a satisfactory alternative system is in place
 should be issued.
- Visits by Pirbright personnel to supplier manufacturing facilities or reference sites
- Issuing relevant training records of all contractors and managers associated with the works Were appropriate, contracts will be administered under an NEC standard form of contract.

4.7 **Project Management Requirements**

4.7.1 Project Meetings.

Regular project progress meetings between the Project Manager will take place with the Principal Designers / contractors and any other relevant personnel required regularly. Technical Working Groups to be held weekly. (See section 4.7.9).

4.7.2 Project Risk Register

A project risk register is included in Appendix C

4.7.3 **Project Programme**

An envisaged project programme is included in Appendix D. A live project programme will be agreed in the detailed design phase and then further agreed once contractors are procured. Contractors should provide a delivery and installation programme associated with any works they are quoting for. The Project Manager should own and maintain the overarching project programme and Principal Contractors/Designers should provide information on their elements of works as required.

4.7.4 Documentation Storage

All project documentation will be stored by the site contact the works in the project file on the Pirbright server.

4.7.5 Project Co-Ordination

The following activities will ensure project co-ordination:

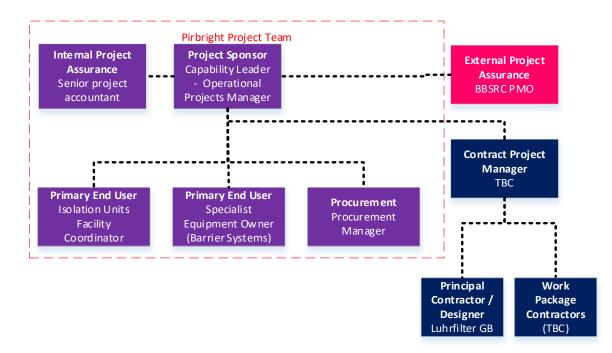
- Regular project management meetings, primarily between the Pirbright client representative and the principal contractor/designer.
- Regular (weekly) Technical Working Groups with project stakeholders to drive progress.
- Regular site checks to see progress and ensure works are taking place in a safe manner.
- Toolbox talks: Principal Contractor or Project Manager to conduct Toolbox Talks with all subcontractors as and when required to highlight any site issues for awareness.
- Regular updates from the Pirbright Project Sponsor overseeing the works to the Pirbright Capability Estates Management Services team.

4.7.6 Client Representative

Pirbright Project Manager will be acting as the Client Representative in terms of CDM responsibilities.

4.7.7 Project Organogram

The envisaged project organogram is shown below:



4.7.8 Responsibilities

The responsibilities of each party for these works are as follows: (A full list of responsibilities is shown in Appendix 10)

Project Sponsor: Capability Leader – Operational Projects Manager. Estimated 2 hours / week (0.05FTE). Project lead on behalf of the Institute. Overall accountability to Pirbright for delivery of the project. Approves orders and tracks project budgets along with project manager. Joint production of PHRs. Acts as the link between the project and Internal & External project assurance.

Internal Project Assurance: Finance Project Accountant Lead: Estimated 0.5 hours / week (0.0125 FTE). Provides financial assurance on project. Produces monthly accounts and checks PHRs prior to monthly operations board.

Primary End User: Specialist Equipment Owner (Barrier Systems): Estimated 4 hours / week (0.1 FTE). Provides technical input and advice to the project. Takes handover on behalf of EMS

Procurement & Capex Tracking: Finance procurement manager: Estimated 0.5 hours / week (0.0125 FTE). Places orders, assists with Cashflows.

Contract Project Manager (TBC): Estimated between 0.5-2 days per week depending upon project phase. Pirbright will appoint a Project Manager who will act as a Construction Manager, in coordination of the Work Packages and a supporting role in the procurement of Work Package contracts, but no contractual links with the Work Package contractors as this is held by the client (Pirbright). The Project Manager's full role is described in Appendix 10.

Principal Contractor and Designer (Luhrfilter GB)

Luhrfilter GB will take on the Principal Contractor and Principal Designer roles as detailed under CDM regulations 2015. This will include the management of a "CDM site" during the construction phases and day to day coordination of Work Package contractors, working with the Project Manager to ensure programme and cost are controlled. Luhrfilter will have no contractual links to the Work Package contractors. The Principal Contractor and Designer roles are described in Appendix 10.

4.7.9 Governance and Working Groups

This project will be delivered through a Construction Management procurement route with the procurement of Work Packages to be managed by the Pirbright appointed Project Manager, through the Pirbright procurement department, using Pirbright's procurement process.

The following Working Groups and project boards will be required to deliver the project:

- Weekly Technical Working Group: Emphasis on Project and design technical issues and problem solving.
- Monthly Operations Project Board: Present overview of monthly Project Highlight Report and answer questions, take direction, discuss any issues.
- Monthly site coordination meeting: Site coordination with other projects and operations, deconfliction as required.

5 Particular Requirements

This section describes the Particular Requirements of each works package of the scope of works.

This is not restrictive or fully detailed and the principal contractors / designers should provide additional detail where required and suggest alternatives if appropriate.

5.1 Work Package 1 – Project Management and client CDM Representative

This work package is for the project management of the delivery of all works outlined in Section 3.2 and fulfilment of CDM client representative requirements for the project. Responsibilities of the role are out lined in section 4.7.8 and further details are provided below.

- Drive day to day activities to deliver the scope of works
- Act as site host for principal contractors / designers
 - The Project Manager(s) are expected to be on site proactively as and when needed to be a site host
- Create and agree with principal contractors the content of the construction site induction, Construction Phase Plan and other documents required to ensure safe working (CDM Works)
- Create and maintain scope of works document
- Create and maintain a project risk register
- Create and maintain project programme
- Create and maintain project resource plan, with an emphasis on any Pirbright staff support requirements.
- Attendance to project boards as per project governance structure and production of Project Highlight Reports with monthly cashflows.
- Managing project documentation
- Request purchase orders are raised through Pirbright procurement processes
 - Co-ordinate the contractor, designers and institute personnel to facilitate works
 - As part of the work, the Project Manager will be the central point of contact for all involved parties.
- Facilitate site access

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- Reviewing and agreeing detailed design before works commence
 - A requirement for these works is that the Project Manager/their company has the relevant technical expertise and qualifications to provide technical oversight for all parts of the project
- Arrange and chair project meetings and issuing notes of meeting
- Responding to contractor queries
- Arrangement of permits and isolations
- Ensuring works are performed in a safe manner
- Fulfil CDM Client Responsibilities including appointing principal contractors/designers and submission of F10 forms for notifiable projects

- Co-ordinating snagging surveys as required
- Handover to Pirbright Engineering Management ensuring all information required by the PIF is available for the Pirbright Institute via the Procore document management system.
- Arranging training where appropriate

6 CDM requirements

This section outlines the CDM specific requirements for the project.

6.1 Client Brief

This scope document forms the client brief.

6.2 Duty Holders

Client

The client is The Pirbright Institute; represented by the Project Manager and as such will:

- Appoint the principal contractor and designer in writing.
- Take reasonable steps to satisfy themselves that appointees have H&S skills, knowledge and experience.
- Complete HSE notification if required and display the notification at a location all contractors can see it.
- Update HSE notification if required.
- Provide Pre-Construction information as required.
- Ensure a construction phase plan is drawn up before works commence and ensure it is updated throughout the project.
- Ensure a health and safety file is drawn up before works commence and ensure it is updated throughout the project.
- Take reasonable steps to ensure the principal contractor and designer are fulfilling their responsibilities.

Principal Designer

The Principal Designer for each work package is to be Luhrfilter GB. The principal designers will:

- Manage all Work Package designers.
- Produce a health and safety file and update it throughout the project.
- Provide pre-construction information as required.

Principal Contractor

The Principal Contractor for each work package is to be confirmed.

The principal contractors will:

- Manage all Work Package contractors.
- Produce a construction phase plan and update it throughout the project.
- Provide pre-construction information as required.

6.3 **Pre-Construction Information**

This document forms the pre-construction information and will be updated and re-issued as appropriate.

6.4 Management Arrangements

Section 4 outlines the management arrangements for the project.

6.5 Notification to HSE

If applicable, HSE notification will be done by the client representative.

6.6 Construction Phase Plan

Separate construction phase plans for each work package will be written and issued by the relevant Principal Contractor. This must be reviewed with the client before any works can begin.

The construction phase plan should include the following sections (relevant sections of this document are also referenced):

- The health and safety aims for the project
- The site rules
- Arrangements to ensure co-operation between project team members
- · Co-ordination of their work, such as regular site meetings
- Arrangements for involving workers
- Site induction
- Welfare facilities
- Emergency procedures, such as fire and first aid
- The control of any of the specific site risks relevant to the project

6.7 Health and Safety File

Each work package should have a health and safety file maintained by the relevant principal designer throughout the project and issued to the client as a standalone document on the completion of works.

It should include the following information:

- Brief Description of the works being carried out.
- Project Risk Assessment.
- Key structural principals.
- Hazardous materials used.
- Information on the future removal of installed plant.
- H&S information about equipment provided for cleaning or maintaining installed plant.
- The nature, location and markings of significant services.
- Information and as built drawings of buildings, plant and equipment.

6.8 Application of CDM to this project

It is envisaged that CDM will be applied to these works as follows:

Work Package 12: Principal Contractor and Designer and design consultancy role: Role as per Business Case Appendix 10 attached.

Project Management role: CDM client representative and full role as per Business Case Appendix 10 attached.