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CDM Regulations - Health and Safety File and Maintenance Manual

Introduction

The extent and content of Building Owners/Maintenance Manuals, prepared for our projects and normally issued at the end of Stage K, varies considerably from project to project. The preparation of such a document, if left unchecked, can be time consuming and unprofitable.

General advice on what should, or should not, be included in a maintenance manual is varied and inconsistent.

This page seeks to clarify the situation and give overall guidance on the content of these documents.

Provision of maintenance information - Architects Duties

RIBA Standard Agreement for the Appointment of an Architect S-CON-07-A

S-CON-07-A states that, if we have agreed to perform the services necessary for the completion of work stage K, we should provide "general advice on operation and maintenance of the building" (Schedule of Services SS-DS-07)

The Architect's Plan of Work published by the RIBA

This booklet, which goes into greater detail than S-CON-07-A, states that, within work stage K, we should:

- o As lead consultant and contract administrator - "co-ordinate the preparation of a Building Owner's Manual with the H&S File."
- o As designer and lead designer - "receive specified data from the contractor and incorporate it in the Building Owner's Manual". Also, as designers, we have duties under CDM. See below.

CDM Regulations - The Health and Safety File

The CDM Regulations 2007 require that a Health and Safety File is prepared by the CDM Co-ordinator. It must contain relevant information needed to safely carry out future cleaning, maintenance, (and, in the case of workplaces: use of), alterations, refurbishment and demolition of the building. The Health and Safety File is not a maintenance manual, but there is no reason why it cannot be incorporated within one. Our duty as designers under these regulations is to provide information for inclusion in the Health and Safety File.

General advice on O&M of the building - What to provide

From the above it can be seen that we have a duty to provide general advice, to receive and co-ordinate specific information and to provide health and safety information. The following guidance has been collected from various published notes and memos.

Information for the preparation of maintenance documentation should be collected throughout the progress of the project and gathered together prior to practical completion. It should include, but is not limited to:

- o Documentation from the main contractor and the sub-contractors as required of them in specification sections A37 or A90.
- o "As built" drawings prepared by the main contractor and sub-contractors.
- o The provision of "Last contract issue" drawings by us. Note that we do not, and must not issue "as built" drawings. We are not in a position to know exactly how everything was built and we leave ourselves open to litigation if we imply this on our drawings.
- o Information from other design consultants who may not be preparing manuals themselves. For example, Structural Engineers, Fire Engineers, Acoustic Engineers.
- o A copy set of the drawings approved by the relevant inspector under The Building Regulations.
- o The Fire Strategy report.
- o All Hazard Elimination & Risk Reduction schedules prepared by us.
- o Instructions about any element of the building that will not be covered above, and for which we had a design input or responsibility.

Published Guidance

BS 4899 Parts 1 & 2 : A guide to user's requirements for technical manuals.

CIRIA booklet C507 : Operation & Maintenance manuals for buildings. A guide to procurement and preparation.

CIRIA booklet C581 : Facilities management – best practice guidance.

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