



Clients' (Risk Strategy) Brief

Guidance on use of the template

Introduction

It is important to consider CDM and Building Regulations requirements from the earliest stages of a project. The client is responsible for establishing suitable management arrangements so that health, safety and welfare are secured. Most clients will require some assistance in identifying the actions required to ensure they satisfy their legal duties.

Process

The following structure and prompts can be used as a starting point for discussions between the client and the project team and can be adapted and developed to suit the needs of the particular project. It is not prescriptive but can assist teams in recognising the interconnected nature of decisions made in the formative stage of the project and can help to demonstrate compliance with the CDM 2015 regulations.

Used intelligently, the process of collaboratively developing a Clients' (Risk Strategy) Brief can act as a powerful team-building tool. Typically, the Client would work with the Architectural lead to start the process in capturing known information and identifying areas where more thought and research may be required.

On simple projects (including domestic) the Strategy Brief may entail no more than a short meeting with the key points recorded. On more complex schemes where more parties will be involved in the project development stage, it is important that the client involves all stakeholders in developing a suitable strategy that gains understanding and buy-in from the whole team. The brief should be completed before detailed design work commences and provided to all designers and contractors as part of the pre-construction information. More detailed risk registers can then be developed and actively managed to eliminate or reduce risks as appropriate.

Benefits

For the client – the brief sets out the management arrangements which the client can monitor as the project progresses through the construction process.

For the principal designer (PD) – the brief enables the PD to plan manage and monitor the design activities, utilising the PD toolkit.

For the designers – significant risks which will need to be addressed during the design development can be easily understood.

For the principal contractor (PC) and contractors – a clear understanding of the client's priorities will enable them to price the requirements for health, safety and welfare into their bids.



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Project name -

Project description

Type (HRB or non-HRB, new build, refurbishment, asset management, etc).
Scope of work. Location/environment. Anticipated project cost etc.

Client's health & safety brief

Who will lead on behalf of the client, what are the functional & operational requirements, expected standards of H&S, F10 requirements, approach to late design changes, H&S file format etc.?



Project timescales

What are the key stages from concept to handover and how long (approximately) will they last?
Are they achievable?

Significant risks

(What are the project specific, unusual, not obvious, hard to manage H&S risks)
(Include schedule 3 (L153) – work involving particular risks; major temporary works;
stability considerations; site logistics/sequencing, fire safety etc.)

Pre-construction information requirements

(Existing site and project information to be provided by the client)
(Refer to Appendix 2 (L153); Address significant risk issues only – see above)



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Project Leadership

(Who are the main duty-holders?)

	Organisation	Lead contact	Contact details
Client			
Principal designer			
Principal contractor			
Other designers			
Other contractors			
Other stakeholders			

Comments: - *(expand on relationships/duty-holders where necessary)*

Procurement strategy

(How will the project team be assembled?)

(Forms of contract being considered; early contractor involvement; advanced works; design and build)

Link to CDM Regulations 2015: <https://www.legislation.gov.uk/uksi/2015/51/contents/made>

Link to HSE L153 Guidance on Regulations: <https://www.hse.gov.uk/pubns/books/l153.htm>



Quality Management Strategy

(How will the quality of completed key elements – foundations, structural elements, fire stopping etc. be inspected and certified.?)

Communication strategy

(How will key H&S messages be identified and disseminated to the workforce?)
(Team meetings; induction process; visual tools/BIM; use of mobile phone, e-mails etc.)