

1 PURPOSE

Works associated with railway infrastructure contracts fall within the scope of the Construction (Design and Management) Regulations 2015 (CDM). In accordance with CDM requirements and those of Network Rail, Construction Phase Plans, Work Package Plans, Task Briefing Sheets, and any Supplementary Detailed Work Instructions are required.

This requirement shall be supported by the undertaking of task and site-specific risk assessments in accordance with the requirements of SAF30, and the subsequent production and use of the appropriate Construction Phase Plans, Work Package Plans and Task Briefings to cover all aspects of the specific works.

This procedure confirms the requirement for risk assessments to be undertaken and describes in detail the process for the generation, issue, control, and management of project work management documentation. It mandates the use of a consistent format and core content for Construction Phase Plans, Work Package Plans and Task Briefings.

NOTE: Where the term "Method Statement(s)" is found within Network Rail Standards and the Rulebook GE/RT8000 the Work Package Plan and Task Briefing Sheet meet the requirements of the term "Method Statement".

2 SCOPE

This procedure is mandatory and applies to all VolkerRail's work activities, including surveying (noting the separate access survey requirements which are held in ENG03), in relation to the production and content of Construction Phase Plans, Work Package Plans, Task Briefing Sheets and Supplementary Detailed Work Instructions. Where a client mandates an alternative process to be followed this shall take precedence over this procedure, subject to meeting the requirements of CDM regulations.

3 REFERENCES (INPUTS) / RELATED DOCUMENTS

3.1 Legislation

- Health and Safety at Work Act 1974
- Construction (Design and Management) Regulations 2015
- The Management of Health and Safety at Work Regulations 1999

3.2 Client / Industry Standards

- RSSB GE/RT8000 The Rule Book
- NR/L2/OHS/0044 Planning and Managing Construction Work
- NR/L2/OHS/0047 Managing Health and Safety in Construction
- NR/L2/OHS/019 Safety of People at Work on or near the Line
- NR/L2/RSE/02009 Engineering Management for Projects

3.3 VolkerRail

- ENG01 Engineering Assurance Handbook
- ENG03 Production of Project Documentation for Non-construction Work.
- SAF19 Safety of People Working On or Near the line
- SAF30 Risk Assessments
- SAF53 Construction (Design and Management) Regulations 2015

4 DEFINITIONS

DEFINITION	MEANING
Acceptance	Acknowledgement that a submission is deemed to be satisfactory.

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DEFINITION	MEANING
ACM	Asbestos Containing Materials
Construction	As defined in the Construction (Design and Management) Regulations 2015 (CDM 2015): the carrying out of any building, civil engineering, or engineering construction work.
Construction Phase Plan (CPP)	A project specific document detailing how VolkerRail will manage the project Health & Safety requirements (CDM 2015). VolkerRail template ENG02F03
Contractor's Engineering Manager (CEM)	Person within every design and/or construction organisation contracted to Network Rail, (or to a party other than Network Rail where agreed with Network Rail) with overall accountability for all engineering activities applicable to that specific contract including those undertaken by subcontracted organisations. The CEM may also be appointed as the Contractor's Responsible Engineer (CRE) for a single engineering discipline.
Contractor's Responsible Engineer (CRE)	Person within a design and/or construction organisation contracted to Network Rail, (or to a party other than Network Rail where agreed with Network Rail) with accountability for the day-to-day management and coordination of the technical and engineering activities within a specific engineering discipline for a specific Contract.
Controller of Site Safety (COSS)	A person who is certified as competent to enable activities to be conducted by a group of persons on Network Rail railway infrastructure in accordance with the requirements of the Rule Book GE/RT8000.
DRN	Document Review Notice (Network Rail process NR/L2/RSE/02009/Module 2)
Engineering Management Plan (EMP)	The EMP defines the accountabilities, responsibilities, roles, and processes applicable to engineering staff working within a delivery group or project. May also be referred to as the ECMP, engineering and construction management plan.
Engineering Supervisor (ES)	The Person responsible for establishing and managing an engineering worksite and authorising train movements for access, egress, and within a worksite. On larger or complex worksites, the ES may delegate certain duties to competent persons, such as the ES assistant.
HSQES	Health, Safety, Quality, Environment and Sustainability
IMS (VolkerRail Integrated Management System	A formal collection of the company's management arrangements necessary to maintain our Safety Certificate, Principal Contractor's Licence, Plant Operators' Scheme Licence, and ISO certification, and encompasses all functional businesses throughout VolkerRail. Current VolkerRail procedures and instructions are maintained to support and implement the specifics of the IMS and places specific responsibilities on individuals.
M&RP	Metro & Rail Projects
OLE	Overhead Line Equipment
Permits	Additional information to be added to the SWP such as, but not limited to: • Electrical Isolation • Permit to Dig • Hot Works • Lifting
Principal Designer	A principal designer is a designer who is an organisation or individual (on smaller projects) appointed by the <u>client</u> to take control of the preconstruction phase of any project involving more than one contractor.

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Principal Contractor	An organisation undertaking the duties of the principal contractor under the Construction (Design and Management) Regulations 2015 (CDM). They plan, manage, and monitor the construction phase and coordinate matters relating to health and safety during the construction phase so that construction work is undertaken without risks to health or safety.
Principal Contractor Licence Holder	An organisation assured against the Network Rail Principal Contractor Licensing (PCL) Scheme. An organisation discharging Principal Contractor duties, on construction work where Network Rail is the client, which has relevant management systems in place.
Proposer	Person responsible for planning and defining how the work activity is to be undertaken.
Risk Assessment	A systematic process of evaluating the potential risks that may be involved in a projected activity or undertaking.
RM – Responsible Manager	Person responsible for deciding how work is prioritised, appointing work planners, preparing the Safe System of Work (SSoW), and reviewing, authorising, or rejecting a Safe Work Pack.
RSSB	Railway Safety Standards Board
SAF	VolkerRail Safety Document
Site Survey	Non-intrusive inspection of infrastructure e.g. topographical survey, access surveys, substation visual survey, height, and stagger survey, lift planning survey.
SPC	Site Person in Charge
Specialist Risk Assessment	Assessments including but not limited to manual handling, COSHH, working at height
SSA	Site Specific Addendum
SSoW - Safe System of Work	A method of working that includes arrangements to so that those who are to walk or work on or near the line are not put in danger by: • passing trains or movements • entry to and exit from railway infrastructure. • walking on or near the line • walking to or from a site of work • setting up and withdrawing protection or warning arrangements • undertaking work.
Structure	As defined in the <i>CDM 2015</i> : a) any building, timber, masonry, metal or reinforced concrete structure, railway line or siding, tramway line, dock, harbour, inland navigation, tunnel, shaft, bridge, viaduct, waterworks, reservoir, pipe or pipeline, cable, aqueduct, sewer, sewage works, gasholder, road, airfield, sea defence works, river works, drainage works, earthworks, lagoon, dam, wall, caisson, mast, tower, pylon, underground tank, earth retaining structure or structure designed to preserve or alter any natural feature, and fixed plant; b) any structure similar to anything specified in paragraph (a). c) any formwork, falsework, scaffold, or other structure designed or used to provide support or means of access during construction work, and any reference to a structure includes part of a structure.

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DEFINITION	MEANING
Supplementary DWI	Supplementary Detailed Work Instructions. Task specific instruction detailing technical requirements for successful completion of the technical elements of the task. For example, TBS for terminating signalling cables in a location case may include a DWI detailing which cable entry points and terminations to use.
TBS	Task Briefing Sheet as described in client standard NR/L2/OHS/0044. VolkerRail template ENG02F03
WPP	Work Package Plan as described in client standard NR/L2/OHS/0044. VolkerRail template ENG02F02

5 PROCESS

5.1 Competence

Individuals appointed to be responsible for preparing, approving, and accepting CPPs, risk assessments, WPPs, TBSs and supplementary DWIs, shall have sufficient capabilities, training, skills, knowledge, and experience. The competency requirements for individuals producing these documents shall be determined before the documents are prepared and approved.

This will be managed via application of <u>ENG01M001</u>, and records maintained in line with <u>ENG01M011</u>. The <u>ENGM011F01</u> register of competence shall be maintained by the **CEM** and the unique document reference recorded in the CPP.

Individuals involved in the preparation, approval, and acceptance of the CPP, risk assessments, WPP and the TBS shall be recorded on the cover sheet of each document. Independence in the roles is imperative and there shall be no duplication of signatures.

The CPP shall include the name and role of all those approved as competent to authorise, manage and brief WPP documents.

The level of competence required will be assessed by the **CEM** in accordance with the requirements of NR/L2/RSE/02009 and the project Engineering Management Plan. In assessing the level of competence required the CEM shall undertake, as a minimum, a CV review of the individuals concerned taking cognisance of the complexity of the project concerned.

5.2 Construction Phase Plan

5.2.1 CPP Preparation

Prior to undertaking physical works, the VolkerRail **Project Manager** will prepare a CPP for approval by the **CEM**. When approved for issue, the VolkerRail Project Manager will then submit the CPP through the CDE, for acceptance by the Client.

VolkerRail projects will use the ENG02F01 template to deliver its Network Rail projects. The template is a direct replica of the client's NR/L2/OHS/0044/F01 document. It contains guidance which should be read in conjunction with the client's template.

Clients other than Network Rail may require their own templates to be used, which is acceptable, but the content of NR/L2/OHS/0044/F01 should be noted as good practice and considered for inclusion.

The **CEM** in conjunction with the Client and Principal Designer will agree the schedule of significant risk WPPs that require acceptance by Network Rail and agree submission and acceptance timescales for those WPPs, including a process and timeline for re-submitting rejected WPPs. The timescale for submitting WPPs to Network Rail for acceptance shall not normally be less than 21 days prior to work commencing.

The CPP should not unnecessarily duplicate information found in other documents. This information should be referenced into the CPP and be readily available within the project information management system. Further guidance is available within the CPP template ENG02F01.

5.2.2 CPP Timescales for Submission

The CPP shall be submitted to the **CEM** a minimum of one week prior to the formal submission to client.

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The formal client submission shall allow the client 28 days (or as stated in the contract) to review before works commence.

5.2.3 CPP Approval

Prior to submission to Network Rail for acceptance the CPP shall be approved by the appointed **CEM** for the project.

5.2.4 CPP Briefing

Once acceptance of the CPP has been received from the NR Client Representative, the VolkerRail **Project Manager** shall brief the contents of the CPP to senior members of the project team and all staff responsible for producing and approving WPP.

The preferred method for recording the briefing is through the use of ASite which will additionally record distribution. Other methods are accepted if it can be demonstrated as similarly robust.

The CPP will be made available to all recipients of a related WPP as a minimum and to other members of the project delivery team where there is relevance to their role.

5.2.5 CPP Review

During the construction phase it is possible that site conditions, access arrangements, client requirements, work methodology, named project individuals, etc, might change. To ensure the CPP remains fully aligned with the construction requirements, it shall be reviewed and updated at every point of material change, and at least 6-monthly throughout the construction phase to confirm it remains proportionate to the scale and complexity of the risks. The CPP shall be reviewed in accordance with SAF53 – Construction (Design and Management) regulations 2015.

Changes to the CPP shall be briefed to the senior project team and all staff responsible for producing and approving WPP within 4-weeks of the change being made.

As part of CPP review, the Client, Principal Designer, and the Principal Contractor shall:

- review the pre-construction information and significant risks associated with the work, the site, and the proposed management arrangements.
- review the content and outputs from the project hazard record in accordance with NR/L2/RSE/02009 and NR/L2/RSE/100/02
- review the schedule of WPPs for client acceptance, agree submission and acceptance timescales including a process and timeline for re-submitting rejected WPP's.

5.3 Work Package Plans

5.3.1 WPP Preparation

WPPs will be developed for all activities and other works aligned within the project's WPP schedule contained within the CPP. The content and number of WPP produced for any given project will be aligned with the complexity and scale of the project.

VolkerRail projects will use the ENG02F02 template to deliver its Network Rail projects. This includes VolkerRail's subcontractors. The template is a direct replica of the client's NR/L2/OHS/0044/F02 document. It contains guidance which should be read in conjunction with the client's template.

Clients other than Network Rail may require their own templates to be used, which is acceptable, however the content of NR/L2/OHS/0044/F02 should be noted as good practice and considered for inclusion.

Risk assessment is a critical activity associated with the production of a WPP and should be completed in accordance with <u>SAF30</u>. Each WPP will contain all appropriate risks, transferred from the CPP, that are associated with the specific package of works. Risk should be those identified as significant from the CDM regulations and those which the project additionally deems as significant. An exhaustive schedule of risks is not appropriate for inclusion within the WPP document.

Each WPP will include the activity programme and the requirements for TBS.

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Construction works and site conditions are subject to change and each WPP needs to adequately reflect the risks and controls for the specific package of works.

The WPP content shall relate to the specific work package and not repeat all information contained with the CPP. Information on risks, controls and resources shall be transferred from the CPP and detailed within the relevant WPP(s) where appropriate.

The responsibility and arrangements for delivering the TBS to the workforce must be clearly defined in the WPP. (e.g. the Site Manager > Supervisor > Team).

5.3.2 Timescales for Submission

WPPs shall be submitted to the **CEM** a minimum of twenty-eight calendar days before the work commences.

WPPs shall be submitted to the client a minimum of twenty-one calendar days before work commences. Those deemed significant shall be issued for acceptance. Those deemed not significant shall be issued for information.

At the time of issue to the client, the WPP shall be fully signed by both author and approver.

Where the above timescales for significant WPPs cannot be achieved, the VolkerRail **Project Manager** must agree and document a revised timescale with the Network Rail Project Manager that allows for review and acceptance in line with the requirements of NR/L2/OHS/0044, or other formally agreed and documented time scale.

All material revisions to a significant WPP that have previously been accepted by the client shall be resubmitted to the client Project Manager for approval/acceptance at the earliest opportunity.

5.3.3 WPP Approval

The **CEM** shall retain accountability for WPPs and shall approve all WPPs.

5.3.4 WPP Briefing

Once approved the contents of the WPP shall be briefed by the **CRE** to the relevant members of the project team and all staff responsible for planning works and producing / approving TBS.

The preferred method for recording the briefing is through the use of ASite which will additionally record distribution. Other methods are accepted if it can be demonstrated as similarly robust.

The WPP will be made available to all recipients of a related TBS.

5.3.5 WPP Review

To ensure each WPP remains fully aligned with the related work package requirements, it shall be reviewed and updated at every point of material change to confirm it continues to accurately reflects the work package and associated risks. If no material change occurs, then a review at 6 months shall be undertaken.

Following each review, changes to the WPP will be communicated to the relevant project team and all staff responsible for planning works.

Where VolkerRail is PC and work is being managed by others, for example, sub-contracted works or interfacing projects, the CEM will review all non-VolkerRail WPPs to ensure they have been produced in accordance with CDM, NR/L2/OHS/0044, and the project CPP. This is to ensure interface risks are adequately managed. This additional check shall be undertaken prior to submission to Network Rail for acceptance / information.

The WPP shall be issued through the project's information management system, with each WPP having a unique identifier and changes managed via agreed revision control.

5.4 Task Briefing Sheet

5.4.1 TBS Preparation

Following the issue of the approved WPP, the **CRE** will ensure that supporting TBS are developed by nominated staff. TBS will be approved by the **CRE** or nominated staff as identified in the CPP.

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As a norm, the approved TBS shall be available to the supervisor for the works a minimum of three shifts prior to commencement of the works. In circumstance where information is not available at this time, the approved TBS can be provided later, but not less that the shift immediately prior to commencement of the works.

VolkerRail projects will use the ENG02F03 template to deliver its Network Rail projects. This includes VolkerRail's subcontractors. The template is a direct replica of the client's NR/L2/OHS/0044/F03 document. It contains guidance which should be read in conjunction with the client's template.

The information on risks, controls and resources associated with and relevant to the task shall be transferred directly from the WPP and detailed within the associated TBS. The TBS should also address the site-specific element – activity risks, interface risks, environmental risks (e.g. waste management, noise, and ecological impacts) and other specialist risk assessments. The risks identified shall not be an exhaustive list of risks and shall instead focus on key significant risks.

Specialist protection requirements e.g. specific choice of hearing protection, respiratory protective equipment must be identified within the TBS, along with task specific machinery/jobs to be listed and the radius and level of protection needed.

To reduce the size and complexity of a task brief, where detailed work instructions are extensive, or applicable to consecutive shifts undertaking the same task, in the same place with asset detail changes, it is permissible to outline the task in the TBS and refer to a supplementary detailed work instruction (DWI).

Examples where a DWI might be appropriate are:

- wiring an apparatus housing.
- installing components on the same structure.
- survey or inspection activities over a defined area.
- installing switchgear.

5.4.2 TBS Approval

The details of who will sign off and manage TBS shall be stated in the CPP.

5.4.3 TBS Review

Prior to issue, the TBS and any supplementary DWI will be reviewed by the relevant discipline **CRE**, or person nominated in the CPP, to ensure task / activity risks and controls, including interface risks, are detailed in the TBS sheet and where included the supplementary DWI. The significant risks identified in the WPP shall be included in the TBS where appropriate to the specific task.

The TBS must be appropriate to the tasks undertaken; for complex works a TBS should be developed for each shift. For less complex repetitive works, TBS may cover an extended period of work but not be for more than 14 days.

TBS will be allocated a controlled issue number identified to the WPP and issued through the project document control arrangements. TBS will be issued as part of the site documentation with copies available at site access control.

5.4.4 TBS Briefing

The TBS brief allows those who are undertaking the work to understand:

- the scope of the work.
- the demands of the task.
- their responsibilities.
- the required competences, skills, and abilities.
- how to undertake the work without risk to themselves or others; and
- any associated supplementary detailed work instructions.

The TBS and where applicable DWI shall always be made available at the work location i.e. where the work is being undertaken. Risk Assessments should be available at the work location when required.

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Anyone who has not been briefed or did not understand and / or sign the TBS Briefing Record shall not undertake work.

5.4.5 Site Access Control

Such briefings may also be supplemented by Site Access Control arrangements when provided as part of the project. Where provided a copy of the applicable CPP / WPP / TBS and supporting documentation will be held in the relevant site access control cabin(s).

5.4.6 Supervisor

Prior to commencement of any works on site, it shall be the responsibility of the **works Supervisor** to ensure that all staff and sub-contract employees are briefed on the applicable TBS / supplementary Detailed Work Instructions / Site Specific Instructions.

The **works Supervisor** will use the information contained in the TBS / supplementary Detailed Work Instructions / Site Specific Instructions to brief the workgroup ensuring the bullet points identified in clause 5.4.4 above are covered.

The importance of ensuring continuous compliance with the requirements of the TBS throughout the duration of the works must also be communicated to all persons.

Each member of the work group will sign for receipt and understanding of the briefing, the records of task briefing will be retained with the site documentation.

5.4.7 Changes to the TBS

If during the course of site works it becomes evident that the proposed method of working detailed within any of the TBS / Site Specific Instructions cannot be adhered to, then all requests for amending methods of work must be authorised by the project management e.g. Line Manager or **On-call Manager** and recorded via the **VolkerRail Control Centre (VRCC)**, authorisation will only be granted following a documented dynamic risk assessment relative to the proposed new method of working.

A list of personnel (other than the CRE) deemed competent to authorise Part 7 updates to the TBS will be controlled by the **CEM** for the project and will be held within **VRCC**.

The person authorising the changes must be familiar with the work and be in possession of the TBS and the risk assessments relative to the work being undertaken. The authorising person must review each section of the TBS to ensure that changes requested have been assessed with the same rigour as applied to the approval of the TBS when originally produced.

All authorised amendments must be recorded in Part 7 of the TBS and adequately briefed to the workforce, by the **Supervisor**, **COSS**, **Site Manager or Duty Manager** at site, prior to continuing with the work activity. Documented records of the issues communicated (i.e. the changes to working methodologies) and signature record sheets must be maintained in order to ensure that all relevant staff members have a clear understanding of the amendments, including any perceived additional risks as a result, and the relevant control measures to be adopted.

5.5 Changeover Arrangements

Where a planned changeover of key personnel, staff and sub-contract employees is due to occur through the duration of the works, the arrangements must be appropriately documented within the TBS.

The documented changeover arrangements must be strictly adhered to, to ensure that all incoming staff members are appropriately briefed on the status of the works.

At shift changeover the oncoming supervisor must establish the status of the works and where necessary amend the TBS to ensure that changes to work programme and the associated risk controls are incorporated within the TBS and appropriately briefed out to the work group

Unplanned changeover of key personnel, staff, and sub-contract employees, such as to manage sickness, will be identified in Part 7 of the TBS.

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5.6 Contingency / Emergency Arrangements

Where OTP / small plant breaks down or becomes defective, the WPP and subsequent TBS / Site Specific Instructions must detail that **VRCC** are contacted to make arrangements for the on-call company / provider to attend site, provide fitter cover or arrange for a suitable replacement of plant / equipment if it is to be taken out of service.

For shortfalls in critical labour supply, **VRCC** will be notified to co-ordinate replacement cover where available through key supplier contacts or other worksites with the co-ordination of the relevant **On-call Manager**.

The **On-call Manager** contact details must also be included in the site-specific TBS. **VRCC** must be made aware of the specific plant / labour supply companies on-call contact details the week prior to works commencing.

6 MONITORING

The worksite delivery as described in WPP and TBS will form part of the HSQES site inspection audit programme, which will include the project HSQES team audit of WPP and TBS to ensure the documents have been generated appropriately and the content and format is compliant with client requirements.

7 DOCUMENTATION (OUTPUTS)

- ENG02F01 VR Construction Phase Plan Template
- ENG02F02 VR Work Package Plan Template
- ENG02F03 VR Task Briefing Sheet Template

8 ISSUE RECORD

Issue	Date	Comments
1	30/08/2018	This procedure has been updated to reflect lessons learned from using it on VolkerRail projects. This procedure supersedes SAF42, SAF42F05 and SAF42F06.
2	05/11/2024	Update to reflect current practice and CDM Simplification requirements identified by Network Rail within their Safety Central Website. Templates for CPP, WPP & TB are now provided and are mandatory.

9 WHAT HAS CHANGED IN THIS LATEST ISSUE AND WHY?

- Provision of mandatory CPP, WPP and TBS templates.
- Minor editorial changes made in line with experience gained from using the document.
- Amended briefing requirements for CPP and WPP to align with best practice.
- Introduce supplementary Detailed Work Instructions for use where appropriate.
- Definitions section updated.
- Revised wording on Clause 5. competence to provide further clarity for CEM's on assessing competence
 of individuals required to produce documentation in accordance with this procedure.
- Clause 5.8 amended to incorporate unplanned staff changes.
- Sequences for documents production through to briefing/review amended to reflect current best practice and sequence of events.
- Removal of LU references
- ENG02F01 PC Work Package Plan Review renamed as VR Construction Phase Plan Template
- ENG02F02 STARRT Card (LU) renamed as VR Work Package Plan Template
- New ENG02F2 VR Task Briefing Sheet Template introduced.

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10 BRIEFING REQUIREMENTS

All new employees will receive an introduction to the Integrated Management System (IMS) at induction, according to the nature of the role.

All employees with an email address receive the 'Record of Revisions' each month, which details changes to the IMS. All Line Managers retain the responsibility to ensure their staff are briefed on changes as appropriate.

The following table defines how revised issues of this document are briefed to existing employees according to related specific responsibilities.

This is determined using the 'RACI' principle. Those roles identified as 'Responsible' and 'Accountable' should receive a formal awareness briefing facilitated by the Document Owner.

Discipline	Role	RACI	Type of briefing	
Senior Management	Chief Engineer	Accountable	None (Nominated Responsible Manager)	
Senior Management	HSQES Director	Consulted	Awareness	
Senior Management	Professional Heads	Responsible	Detailed	
Project Management	Project Manager / Assistant / Senior, plus associated roles.	Responsible	Detailed	
Delivery	Construction Manager	Responsible	Detailed	
Delivery	Site Supervisors / Manager	Responsible	Detailed	
Engineering	Engineering Manager	Informed	Awareness	
Engineering	Project Engineer / Senior	Informed	Awareness	
HSQES	VRCC Duty Controller	Informed	Awareness	
HSQES	H&S Manager / Advisor	Informed	Awareness	
HSQES	Head of Quality Systems	Informed	Awareness	
HSQES	Quality Systems Manager	Informed	Awareness	

Competence	RACI	Type of briefing
Contractors Engineering Manager (CEM)	Responsible	Detailed
Contractors Responsible Engineer (CRE)	Responsible	Detailed
On-call Manager	Responsible	Detailed

11 IMS AUTHORISATION

Document owner approval:

Kevin Robertshaw, Chief Engineer, 05/11/2024

Document Author approval:

Ben Mather, Professional Head of Civil Engineering & Multi-Disciplinary Design, 05/11/2024

Approval for IMS:

Paula Roberts, IMS Coordinator, 05/11/2024

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