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Principal designers

Our pdf guide talks you through the role of a principal designer and what it entails. With the introduction of the Construction (Design and Management) Regulations in 2015, the role of principal designer was introduced and is one that you need to have in construction projects where more than one contractor is appointed. We want to make sure you understand why the role has been introduced and what a principal designer should be doing on construction projects.

Who can be a principal designer?

Although this might seem like a simple question, it is not always obvious who has the capability to be the principal designer. On larger projects the principal designer will usually be an organisation that undertakes principal designer duties. For smaller projects it could be an individual that takes on the role of a principal designer. Principal designers, whether individuals or organisations, must have design process knowledge and be effective in design decisions as far as health and safety is concerned. Whoever the principal designer is they should have;

- An understanding of how health and safety is managed in the process of design
- Good technical knowledge of the construction industry that is suited to the project
- Skills to oversee the pre-construction phase of a project and ongoing design
- Have the duty, to plan, manage, monitor and coordinate design throughout

Responsibilities of a principal designer

There are three main roles in the management of health and safety on a construction project. The client has overall responsibility for making suitable arrangements for managing a project, while the principal designer and the principal contractor must plan, manage, monitor and coordinate the construction elements of the project. They are all important roles to ensuring health and safety on site and avoiding any accidents. A principal designer must be appointed in writing by the client and you can also combine the role with others you are undertaking such as project manager. Your main duties will be to;

- Assist the client to identify, obtain and collate all of the pre-construction information
- Give pre-construction information to designers, principal contractors
- Make sure that designers comply with their duties and co-operate
- Liaise with principal contractor for the duration of your appointment
- Prepare a health and safety file

What you'll learn from the rest of this guide

We want to provide you with a complete understanding of the role of a principal designer so we aim to cover all aspects of the role. The position is important in making sure that health and safety risks in design are communicated to the construction team. It is therefore hugely important that all aspects of the role are carried out properly to ensure the safety of all. Aside from the immediate impact in the physical injury to employees, it can also prove costly for business if you have employees off work for long periods with injuries or ill health. You can expect to learn;

- Tasks a principal designer can expect to do
- Information required for the project
- What a good result should look like

Tasks a principal designer can expect to do on a project

A principal designer has the responsibility of managing the health and safety matters in design of a site during the pre-construction phase. One of the first tasks that a principal designer will need to help with therefore is the project set-up. Assisting with the project set-up is essential to make sure the right health and safety arrangements are in place from the start. You will want to find out how much your client knows about this type of project and their previous experience. You may well be asked to help the client create an initial brief if they don't have previous experience in the area.

Although the client is required to identify and obtain pre-construction information, you may need to assist the client in doing this and collating the information so that it can be passed to the designers, principal contractor and specialist contractors during the various phases. This ensures that the correct health and safety precautions are in place from the start.

Pre-construction information – checks that should be made

- Is the information reliable?
- Where has the information come from?
- How old is the information and is it outdated?
- Is the information relevant or has it been superseded by subsequent works?
- Could a site visit help to confirm the accuracy of the information?
- Is the information complete or is there something missing?
- Do you need to undertake further studies?

These are the questions that you should be asking during the pre-construction phase to make sure that you have all of the necessary information you need to complete the job. You should also agree with the client and project team when updates will be undertaken and who needs that information. For example, the developing pre-construction information will be needed by many in order to ensure information flow and risks are managed and arrangements coordinated.

Oversee the pre-construction phase and co-ordinate the process

Another task that you will need to undertake during the planning process is making sure that you plan, manage and oversee the pre-construction phase and co-ordinate matters relating to health and safety. A principal designer has the responsibility to make sure they co-ordinate health and safety with all designers that are part of the project team. This includes the likes of temporary work designers and anyone else who has design responsibilities on the project in any way. Make sure that you tell designers what you expect from them so that all aspects of the project are covered. By making sure that effective co-ordination happens you can identify and advise others of any potential health and safety risks during the full project cycle.

Also the principal designer must plan, manage and oversee health and safety related design decisions during the pre-construction phase but not all other aspects of the design process. As a principal designer you are not expected to consider non health and safety matters during the design development phase. You should make sure that you are focusing your attention on any areas where there is a significant risk to health and safety in the project. This includes things like changes or alterations to the original design, which can be achieved by holding or leading design review meetings. Make sure that you challenge designers on aspects you are not clear of and obtain assistance should you not have the technical knowledge or experience about some aspects of the design.

Information required for the project

You should receive all available information relating to health and safety from the client at the start of the project to make sure you have everything to consider what further information will be required. You should call for and be provided with information at different phases of the project so that you can make sure risks are identified, eliminated where possible and residual risks are advised to others. As principal designer you should be given information at the project set-up, before you start work. It's important to get your appointment in writing and this should also outline your scope of services to others. The initial client brief should set out the functional and operational requirements but it should also highlight their health and safety expectations. There is certain information you will require but also certain information you will be expected to provide.

Information required by the principal designer

- You should be informed of any issues or health and safety concerns in the content of the client brief or any other existing information
- Designers must provide you with health and safety information relating to their design including any unusual remaining risks and details
- A principal designer will also need details about the design information for the health and safety file, that would be required for the post-construction phase
- You should also provide feedback on the pre-construction information you are provided with to ensure that it complies with CDM
- The principal contractor will need to provide construction information that includes any changes to the original designs, which is required for operation and maintenance

Information you should provide

- You should provide the client with your proposal at the project set-up that outlines the scope of your role and how you intend to fulfil it
- Part of the role is to provide advice to the client about the information required for the preconstruction information and focus on any gaps in the available information
- As part of your role you should provide information to all the designers that may include the client brief for the project and any specifications or minimum standards
- It will be useful to share the information of the client with the designers as part of your coordination role
- You should inform the designers of your expectations with regards to how the preconstruction phase should be carried out
- The client will expect to be updated on the progress of the pre-construction phase such as the status of information gathering and development of the design
- During the pre-construction phase you must provide the pre-construction information to the principal contractor that will be used to prepare the construction phase plan

As the principal designer you will be expected to provide significant information relating to hazards and risks both in the pre-construction period and also during the actual construction phase. This is to ensure that all aspects of health and safety have been identified and communicated. The role requires an effective level of co-ordination and this includes during the completion and handover phase of the project.

What does a good result look like?

In conclusion we want to give you some examples of what good practice is and what you should look to deliver on a project. The following examples are not what is required by CDM regulations but rather illustrate how the work will ideally be carried out. If you follow our steps, then you should be able to provide a high level of service. It also illustrates how the principal designer can contribute to the success of a project.

Good examples of work assisting with the project set-up

- You should provide the client with a schedule as soon as you have been appointed with a detailed schedule of resources and services to help plan the design process
- Managing the health and safety aspects of a project will prove much easier if you develop a good working relationship with the client
- Making sure that you understand the brief from the start and will help give you further insight into their requirements
- Clarify the roles of individuals on the project to make sure that confusion is avoided and allows parties to distinguish between different roles
- Leadership is an important aspect of the project and you should encourage project team meetings. This will also allow everyone to discuss and solve health and safety aspects of the project
- Visit the site early to get a better understanding of the site arrangements and conditions and also review the existing information you have

Good examples of work when co-ordinating the pre-construction phase

- Meet with the client and the designers in a pre-design meeting to discuss the brief and the management of health and safety on the project
- If you can then you should always seek contractor input during the design phase and this will help you to anticipate potential construction issues
- Joint meeting on design co-ordination across all disciplines as this will help you gain a better understanding of how the design is being developed
- Make sure that you encourage designers to involve end users from the early stages of the design as this helps to gain a further understanding of the proposed use and maintenance of the property
- As principal designer you should make sure that health and safety is the central theme in everything that you do and is managed as part of the project
- Ensure that there is a consistent approach in the way that information is provided by the designers so that you can stay on top of all aspects

- Towards the end of the design stage you should make sure that you review progress and determine anything that may benefit both the client and the project and design team who receive the information

Health and safety is a hugely important aspect of any construction project and as the principal designer you should be taking responsibility for this. Not only can you help to avoid terrible accidents on site and health issues that affect thousands of site operatives but you can also help to make sure that everything runs on time and within budget. The principal designer is a hugely important role in the process and is something that should be undertaken with the highest level of care.