Constructing the Promise, Quality & Field View

Production Technical Courses

Introduction

Housekeeping

Timings

Safety and welfare

Devices and FV set up

Introduction

Workshop content

The workshop will cover the following topics:

- ✓ Overview of ***Delivering the Promise*** (DtP)
- ✓ Stages of ***Constructing the Promise***
- ✓ Understanding ***Trade Quality Plans***
- ✓ Field Tools and how ***Field View support Constructing the Promise***
- ✓ How we use ***Field View to maintain compliance***

Introduction

Learning objectives

- ✓ To understand what '***Constructing the Promise***' is, how this fits within ***Delivering the Promise*** and ***what it means for you***
- ✓ The three stages of 'Constructing the Promise' – ***Clarify, Plan & Prove***
- ✓ Devising quality arrangements and ***TQP's***
- ✓ The ***features of a good TQP***
- ✓ ***Resources available*** to help
- ✓ ***To understand*** what ***Field Tools and Field View*** are, how they support Constructing the Promise and how the company uses the software to stay compliant
- ✓ ***To understand*** some of the different ***SHEQ tasks and forms*** that can be completed on Field View and how should be carried out in ***compliance with the Operating Framework.***

Delivering the Promise

Overview

Delivering the Promise

What is it?

Wates' ***Delivering the Promise programme (DtP)*** aims to ensure that we ***deliver compliant defect free buildings*** that fully ***meet customer expectations***.

Aligned with BSRIA's Soft Landings it is ***underpinned by Wates Operating Framework*** which sets out our ***policies and processes and*** clarifies ***roles and accountabilities*** as well as ***our expectations*** throughout all stages of a project lifecycle.

Delivering the Promise

What does it help us deliver?

- ✓ Consistency
- ✓ Compliant design
- ✓ Understanding of client expectations
- ✓ Improved customer satisfaction
- ✓ Reduced defects
- ✓ Prepares the customer for handover
- ✓ Delivers an excellent handover
- ✓ Provides professional aftercare

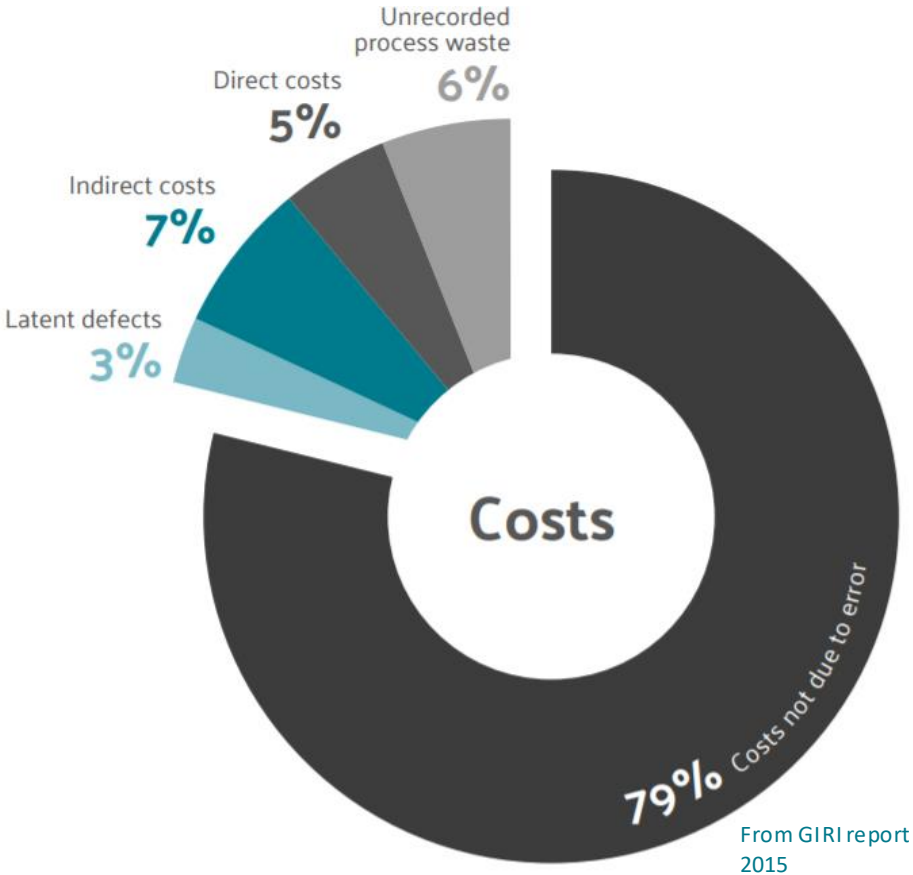
Delivering the Promise

GIRI – The True Cost of Error

The Get It Right Initiative (GIRI) is a not-for-profit industry organisation made up of contractors, clients, consultants, regulators and trade bodies who are working together to improve productivity and quality in the industry by eliminating error.

Good Quality helps us create a sustainable business and safe buildings

- ✓ Saves time
- ✓ Saves money
- ✓ Saves reputation
- ✓ Saves lives



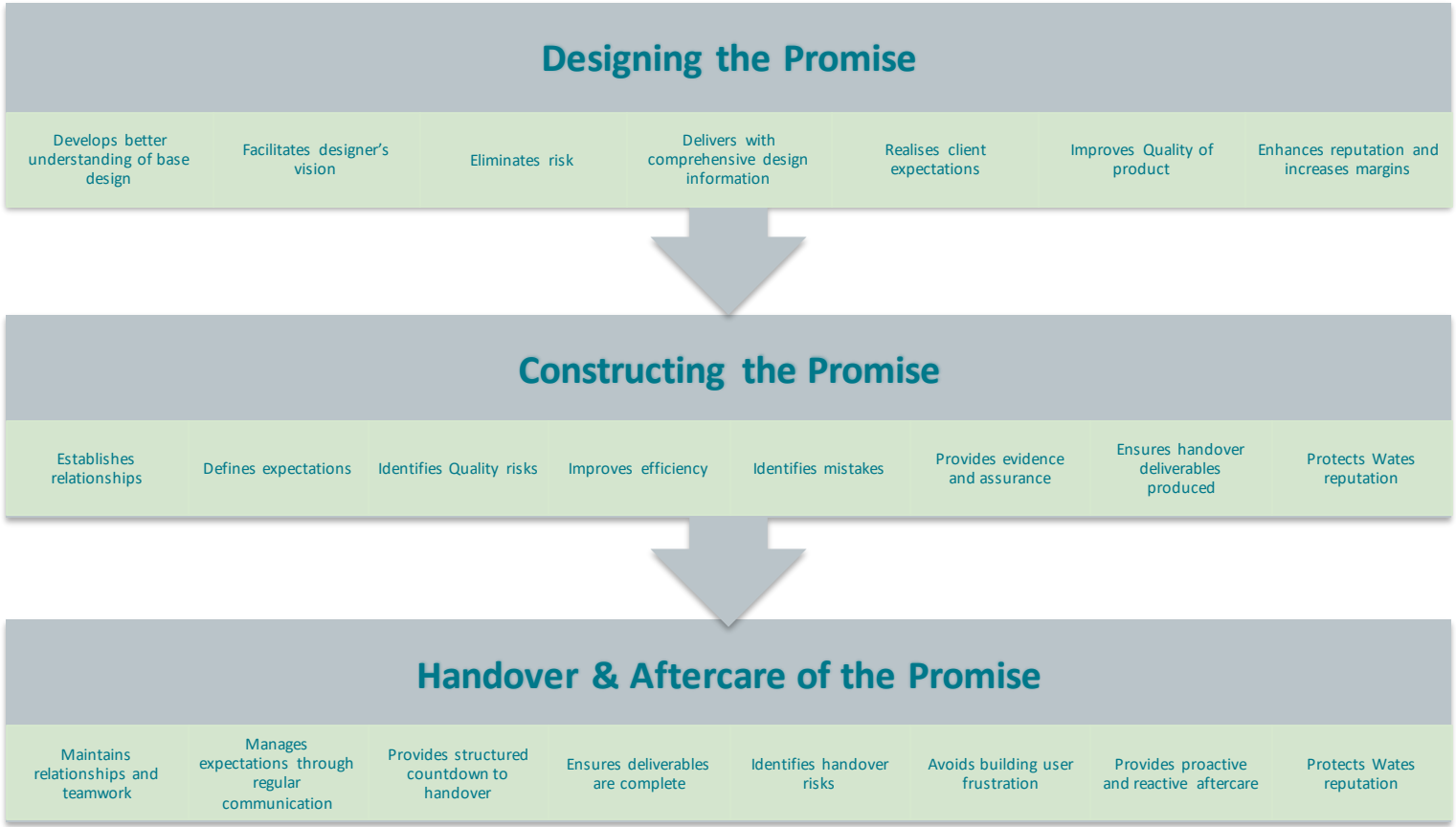
From GIRI report November 2015

Delivering the Promise

What are we looking to change?

From		To
Uncoordinated, late design	→	Fully coordinated, early design
Behind a desk	→	Out on site
Paper checklists	→	Inspecting & engaging
No measures	→	Cost of defects measured
Handover planned at end	→	Handover planned from start
Reactive aftercare (defects)	→	Structured aftercare (courtesy)
PC = finished	→	Customer transition = finished
Customer reporting based	→	Communication based

The Process – Three Stages



The Process – Key Meetings

Designing the Promise

- DtP0 – Collaboration & Relationship Building (16 weeks prior to start)

Constructing the Promise

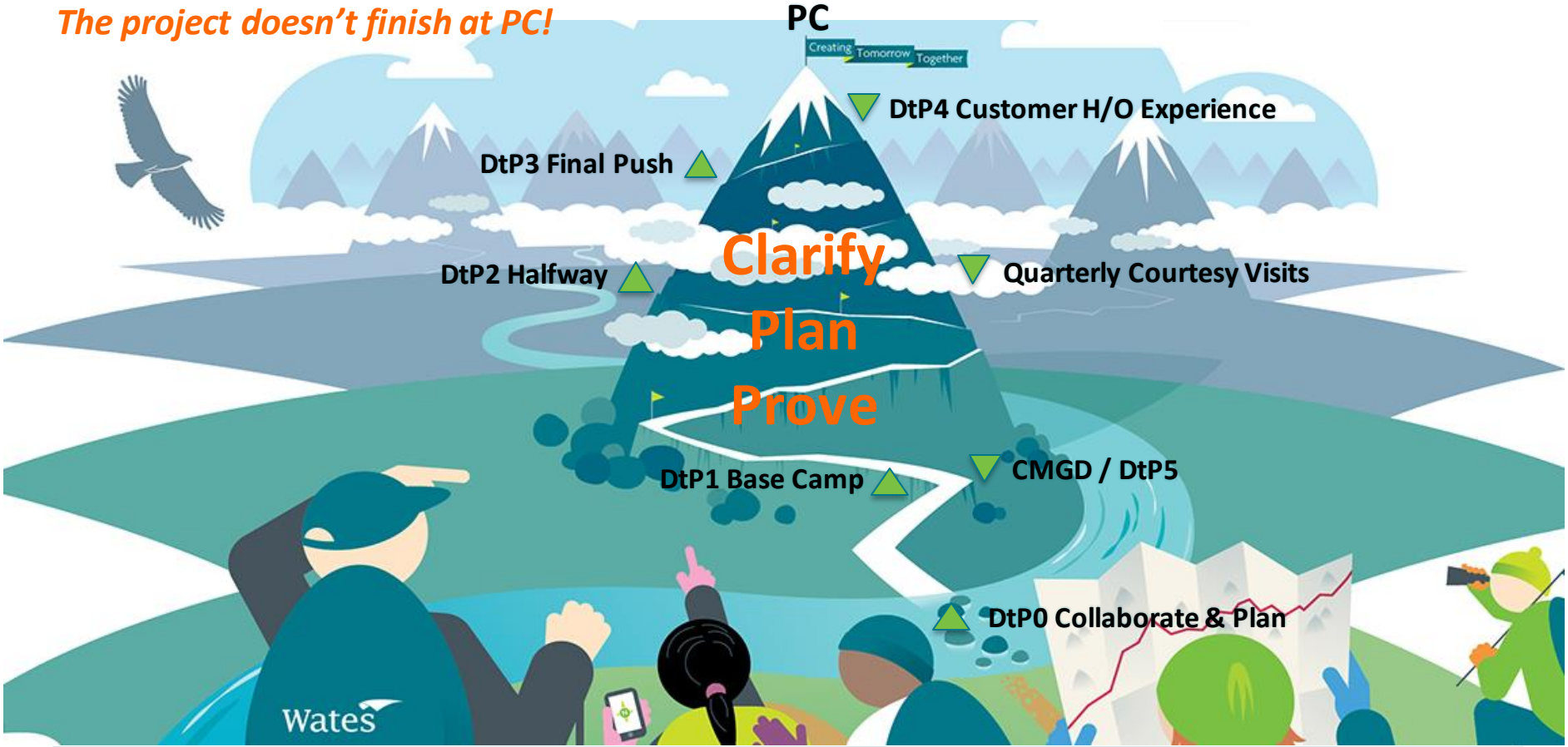
- DtP1 – Project Team Relationship Building (6 weeks after start)

Handover & Aftercare of the Promise

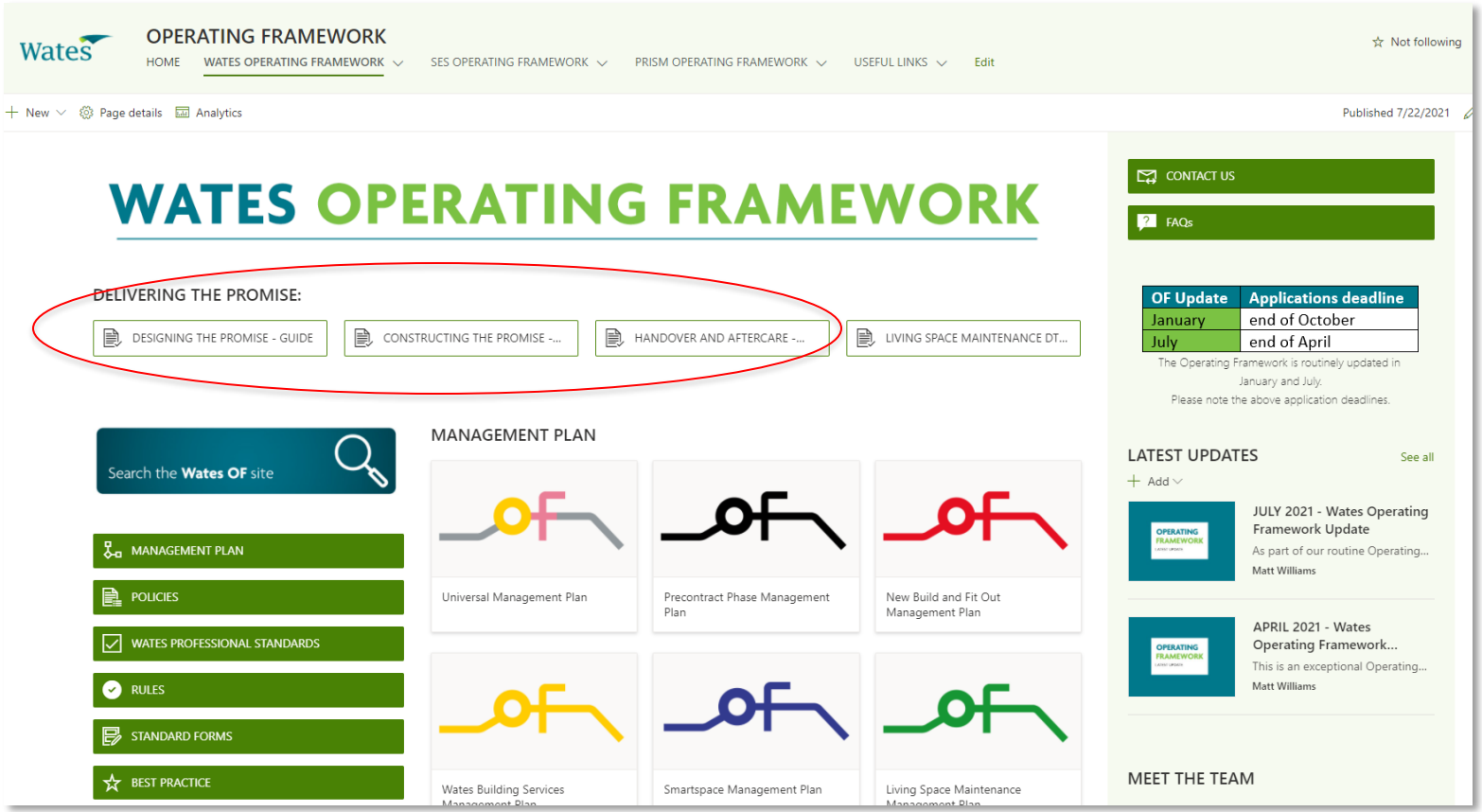
- DtP2 – Initial Customer Handover (half way)
- DtP3a – Building & Customer Readiness Review (12 weeks prior to PC)
- DtP3b – Handover Strategy Presentation (10 weeks prior to PC)
- DtP4 – Customer Handover Experience (6 weeks after PC)
- DtP5 – End of Defects Period Customer Review (end of defects period)

The Process – Project Lifecycle

The project doesn't finish at PC!



Delivering the Promise – Quick Start Guides

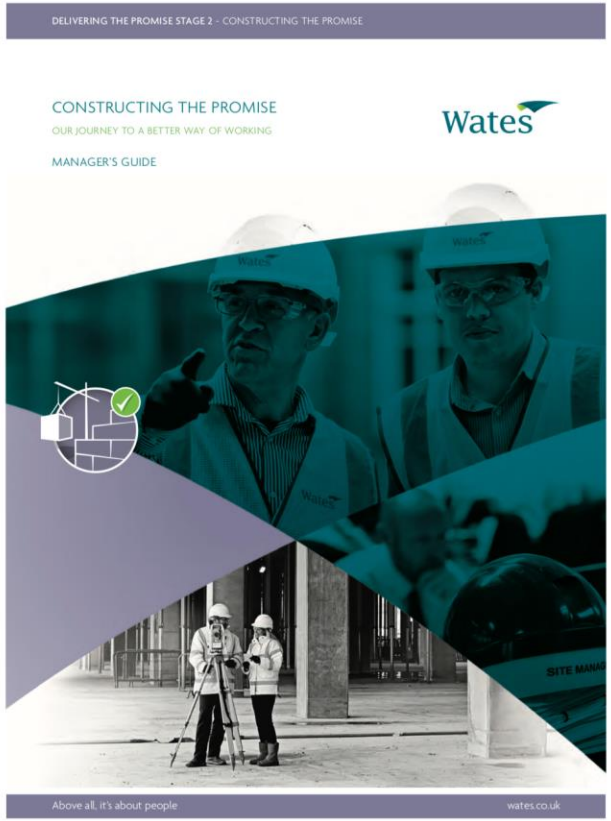


Delivering The Promise – Manager's Guides

Constructing the Promise

Constructing The Promise

What is it?



Constructing the Promise

Outlines our ground-breaking ***proactive approach*** to quality management ***rather than relying on a reactive response*** to defects and customer dissatisfaction. Aims to build relationships and foster teamworking, define expectations, requirements and objectives, identify risks to quality avoiding diversion of resources from productive work.

3 Key elements:

- ✓ Clarify Requirements
- ✓ Plan to Avoid Defects
- ✓ Prove Compliant Delivery

Constructing the Promise

3 Stages of Constructing the Promise

1. Clarify Requirements

- Understand the deal and the planned intent
- Co-ordinate Approvals
- Agree Alternatives

2. Plan to Avoid Defects

- Seek Advice
- Identify Quality Risks & Controls
- Communicate to the Workforce

3. Prove Compliant Delivery

- Establish Hold Points
- Collate Inspection & Test Records
- Record and Action Non-compliance

1. Clarify Requirements

UNDERSTAND THE DEAL AND PLANNED INTENT	CO-ORDINATE APPROVALS	AGREE ALTERNATIVES
To ensure we meet the requirements of the employers requirements and the design	To clarify customer expectations and approval from an early stage	To fully consider and endorse any proposed change
On contract award	To meet the design and procurement programme	To meet the design and procurement programme
• Review the scope and quality of work and services to be provided and by who • Revisit the roles and responsibilities of the wider team • Identify high quality risks • Review building services rationale (with the building user if available) • Review test and commissioning requirements (appoint an independent commissioning manager on all non-domestic projects over £5m)	• Schedule customer deliverables for direct material and component purchases • Ensure sub-contractors schedule customer deliverables for their materials and components in their Trade Quality Plans (TQP). • Co-ordinate and track approvals	• Review of proposed alternatives to assess their suitability (customer satisfaction, cost, quality, programme) • Seek approval of suitable alternatives by the Customer / Designer(s) prior to procurement of materials / components • Record approvals

• Clear understanding of our contracted requirements	• Approved:
	  • Material certificates
	  • Samples
	  • Technical submittals
	  • Benchmarks
	• Completed TQP trackers
	• PrC-014F Change / Alternative Proposals Template
		• Approved alternatives that do not compromise:
		  • Building operation
		  • Building Quality
		  • Our Programme
		  • Our Profit
		• Completed TQP trackers
		• PrC-014F Change / Alternative Proposals Template

Understand, Co-ordinate and Agree

- ✓ Reviewing your scope in detail
- ✓ Identifying key personnel to carry out key responsibilities
- ✓ Reviewing testing and commissioning requirements
- ✓ Ensure all approvals are agreed and scheduled
- ✓ Highlighting the high quality risk trades

2. Plan to Avoid Defects

Discussion

Discuss

What is a defect?

2. Plan to Avoid Defects

What is a defect?

Major defect:

A serious, significant or repetitive product or issue that does not meet the required standard of the contract and/or Building Regulations.

Minor defect:

An item that does not meet the desired standard with limited impact to following trades or the building user. Often cosmetic issues.

Either of these can occur at any point during a project – not just at handover.

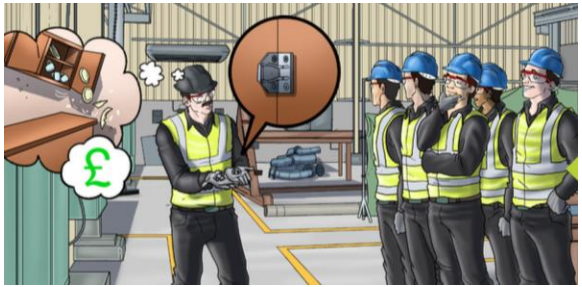
WPS Del 27- Management of Non Conforming/Defective works or Materials

2. Plan to Avoid Defects

SEEK ADVICE	IDENTIFY QUALITY RISK AND CONTROLS	COMMUNICATE TO THE WORKFORCE
To learn from the experience of experts and those that have done similar work before	To identify what could go wrong and how to prevent it	To ensure those doing the work understand how to avoid making a mistake or building incorrectly
When planning each new activity	Before commencing the activity	On commencement of the activity

• Contact manufacturers and suppliers and obtain advice on how to avoid mistakes and defects
• Discuss key quality risks with specialist consultants (e.g. commissioning, façade, acoustic) as applicable
• Talk to the Customer Service Team
• Invite the Performance Excellence Team to comment
• Talk to colleagues who have undertaken similar work
• Read the Avoiding Common Defects handbook
• Read industry best practice on the technical library (CIS)
	• Identify the risk of a mistake or defect by:-
	  • Interface and defect avoidance workshops
	  • Design Team meetings
	  • Supervisor readiness reviews
	  • Collaborative planning sessions
	• Devise controls to help prevent a mistake or defect in the Risk Identification and Control section of Trade Quality Plans (TQP)
	• Check planned controls for prefabricated & significant supplies off site
		• Operative briefings
		• Photographs of what good looks like
		• Manufacturer workshops or training (on or off site)
		• Use of mock-ups
		• Sample and/or fixings boards
		• Prior marking-out on site

• An understanding of correct practice and previous lessons learnt • Dissemination to others in the project team	• All have considered what could jeopardise the quality of their work prior to starting and have planned the task to avoid any risks • Completed Risk Identification and Control section of Trade Quality Plans (TQP) • Del-095 Factory Visit Report	• Operatives who understand what could go wrong and how this is being controlled • Evidence of briefing / instruction and/or training



Seek, Identify and Communicate

- ✓ Seek advice to ensure we understand the systems and products
- ✓ Utilise our Technical Library
- ✓ Review any lessons learnt and best practices
- ✓ Ensure control measures are identified and planned
- ✓ Communicate quality risks and controls with the workforce

3. Prove Compliant Delivery

ESTABLISH HOLD POINTS	COLLATE INSPECTION & TEST RECORDS	RECORD AND ACTION NON-COMPLIANCE
To ensure all know at what point their work will need to be inspected and/or tested	To ensure effective records are made and kept to prove compliance for up to 12 years	To ensure sub-standard workmanship or materials are corrected properly
When planning each new activity	During the activity	On identification

• Consider requirements of:-
  • The Building Regulations and Building Control
  • The specification
  • Consultants and/or technical assessors
  • NHBC or equivalent construction warranty and insurance provider
• Focus inspection and test hold points on work that is later covered
• Correspond the frequency of inspections with the implications of failure
• Supervisor inspections prior to offering
• Develop a detailed Commissioning Programme (with the independent commissioning manager on all non-domestic projects over £5m)
• Agree customer / consultant requirements to witness
• Request a Customer Service Team observation visit
• Coordinate site activities and witnessing requirements with the relevant inspector(s)
	• Establish works are specification compliant and defect free
	• Photograph and/or record on marked-up drawings every element of the works that is covered
	• Utilise Wates Field Tool
	• Obtain signature of witness(es)
	• Ensure receipt of inspection records, certificates, test data, commissioning data and other handover deliverables prior to valuating S/C works
		• Record all snags and defects with the applicable trade
		• Quarantine non-conforming materials
		• Follow the procedure outlined in WPS-Del-27 for all major non-conforming work or materials
		• Appropriately adjust the S/C valuation until the non-compliance is corrected and signed-off
		• Record lessons learnt and ensure Trade Quality Plans (TQP) are updated to prevent re-occurrence

• Completed Inspection and Test Plans (ITP) section of Trade Quality Plans (TQP) • Del-096 Customer Service Team Observation	• Records and sign-offs to demonstrate each section is fully finished and snagged ready for the next trade • Wates Field Tool records • Del-150 Area Close-out Sheet • S/C pay-less notice (if applicable)	• Del-180 Defective Works Notice • Corrected work that complies with the design • Full S/C payment on completion and sign-off of correction • Updated Trade Quality Plans (TQP) indicating lessons learnt

Establish, Create and Record

- ✓ Establish hold points and ensure these are documented
- ✓ Develop commissioning programme
- ✓ Engage with our customer care team
- ✓ Engage with consultants, building control and client team on ensuring requirements are being met
- ✓ Detailed Test and Inspection Plans

Understanding Trade Quality Plans

Understanding Trade Quality Plans

Who should do a Trade Quality Plan?

All subcontractors are required to manage quality. However, the following high risk trades require a **Trade Quality Plan** detailing their quality arrangements (see WPS-PrS-23 Delivering the Promise (Pre-start Phase)


VISUAL STANDARD

DELIVERING QUALITY

Wates

1. Clarify Requirements:

2. Plan to Avoid Defects:

3. Prove Compliant Delivery:

4. Handover:

Trade Quality Plans

SUB-CONTRACTORS' PROFESSIONAL STANDARD:

WE'RE SAFER TOGETHER ZERO HARM

- ✓ Groundworks and drainage
- ✓ Insitu reinforced concrete
- ✓ Building services
- ✓ Brickwork and blockwork
- ✓ Cladding/curtain walling
- ✓ Screeding and sub-floors
- ✓ Partitions/Ceilings
- ✓ Fire stopping/fire protection/fire doors
- ✓ Roofing
- ✓ **Fixings*

N.B. You may choose to request a TQP for additional trades, however they must all be agreed by your Senior Visiting Manager and recorded in the Project Quality Plan

Understanding Trade Quality Plans

What is a Trade Quality Plan?

A TQP is a practical tool intended to help us plan and manage how a trade package or section of works will be delivered efficiently and cooperatively in accordance with the contract requirements in order to meet the standards set out Del-317 (SCPS Delivering Quality).

They should be set out to:

- ✓ **Clarify Requirements** – Understand the requirements of the brief, specification and drawings
- ✓ **The Plan to Avoid Defects** – Explore where things could go wrong, think about consequences and plan practical solutions to mitigate
- ✓ **Prove Compliant Delivery** – how quality will be verified

Understanding Trade Quality Plans

The TQP Main Sections

1. **Requirements of the brief, specification and drawings (Clarify)**
   - ✓ What the customer expects, key specification and brief requirements
   - ✓ Identify Critical Interfaces to Wates so we can organise Interface meetings and agree/co-ordinate requirements
   - ✓ Identify documentary evidence to confirm components and materials used comply with specification, Customer and legal requirements

2. **Plan to build right first time and avoid costly mistakes and defects (Plan)**
   - ✓ Defect Risk Identification and Control – explore where things can go wrong, think about consequences and plan practical solutions

3. **Confirmation of compliant delivery (Prove)**
   - ✓ inspection controls to confirm you built right and keep documentary evidence that help us proving it

Understanding Trade Quality Plans – ***Clarify***

Requirements of the brief, specification & drawings

Scope of Works

- ✓ Ensure everyone understands what needs to be done
- ✓ What level of quality is expected?
- ✓ Any key or unusual brief / specification requirements?
- ✓ Break down work activities (this will help identify risks later)

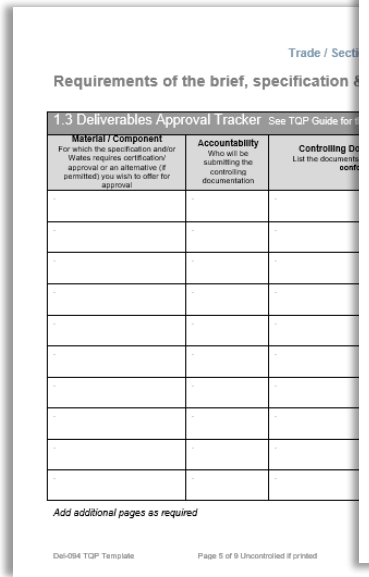
Deliverables Approvals Tracker

Before Fixing

- ✓ Certification
- ✓ Samples
- ✓ Benchmarks
- ✓ Technical Submittals
- ✓ Offered Alternatives

After Fixing

- ✓ As-built Drawings
- ✓ Test Data
- ✓ Testing & Commissioning
- ✓ O&M Manuals
- ✓ H&S File Information
- ✓ End User Training



Trade / Secti

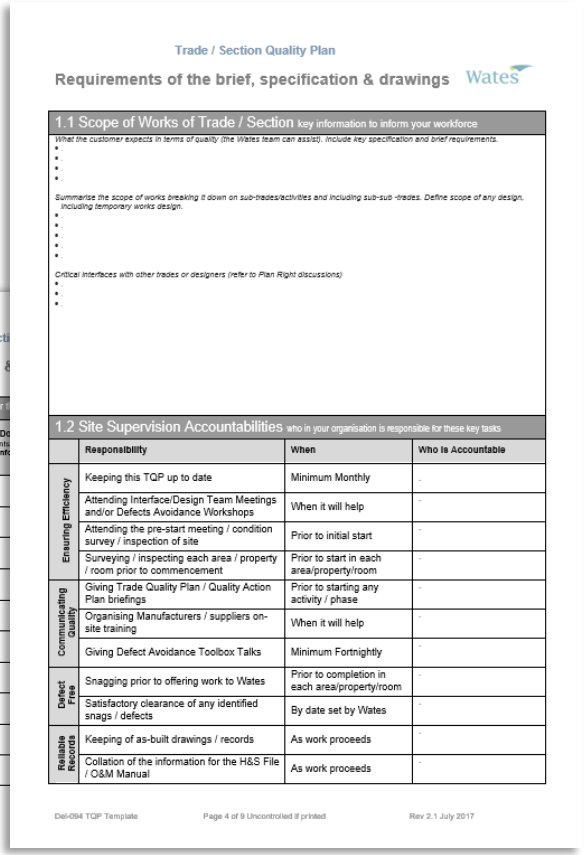
Requirements of the brief, specification &

1.3 Deliverables Approval Tracker See TQP Guide for t

Material / Component For which the specification and/or Wates requires certification/ approval or an alternative (if permitted) you wish to offer for approval	Accountability Who will be submitting the controlling documentation	Controlling Do List the documents conf

Add additional pages as required

Del-094 TQP Template Page 5 of 9 Uncontrolled if printed



Trade / Section Quality Plan

Requirements of the brief, specification & drawings Wates

1.1 Scope of Works of Trade / Section key information to inform your workforce

What the customer expects in terms of quality (the Wates team can assist). Include key specification and brief requirements.

Summarise the scope of works breaking it down on sub-trades/activities and including sub-sub -trades. Define scope of any design, including temporary works design.

Critical interfaces with other trades or designers (refer to Plan Right discussions)

1.2 Site Supervision Accountabilities who in your organisation is responsible for these key tasks

	Responsibility	When	Who is Accountable
Ensuring Efficiency	Keeping this TQP up to date	Minimum Monthly	
	Attending Interface/Design Team Meetings and/or Defects Avoidance Workshops	When it will help	
	Attending the pre-start meeting / condition survey / inspection of site	Prior to initial start	
	Surveying / inspecting each area / property / room prior to commencement	Prior to start in each area/property/room	
Communicating Quality	Giving Trade Quality Plan / Quality Action Plan briefings	Prior to starting any activity / phase	
	Organising Manufacturers / suppliers on-site training	When it will help	
	Giving Defect Avoidance Toolbox Talks	Minimum Fortnightly	
Defect Free	Snagging prior to offering work to Wates	Prior to completion in each area/property/room	
	Satisfactory clearance of any identified snags / defects	By date set by Wates	
Reliable Records	Keeping of as-built drawings / records	As work proceeds	
	Collation of the information for the H&S File / O&M Manual	As work proceeds	

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Understanding Trade Quality Plans – ***Clarify / Plan***

Seek Advice – Where?

Who / what can help?

- ✓ Technical Experts
- ✓ Aftercare Team
- ✓ Someone who has done it before you
- ✓ Manufacturer
- ✓ Del-555 Avoiding Common Defects Booklet
  - prepared to assist project teams and our supply chain to avoid many of the common quality issues that are faced regularly in the industry
  - contents are closely aligned with the DtP Stage 2 – Constructing the Promise
  - topics covered include; Sub-structure, Drainage, Reinforced concrete, Structural Steelwork, Flat/Pitched roofs, Screed, Floor finishes, Tiling and way more

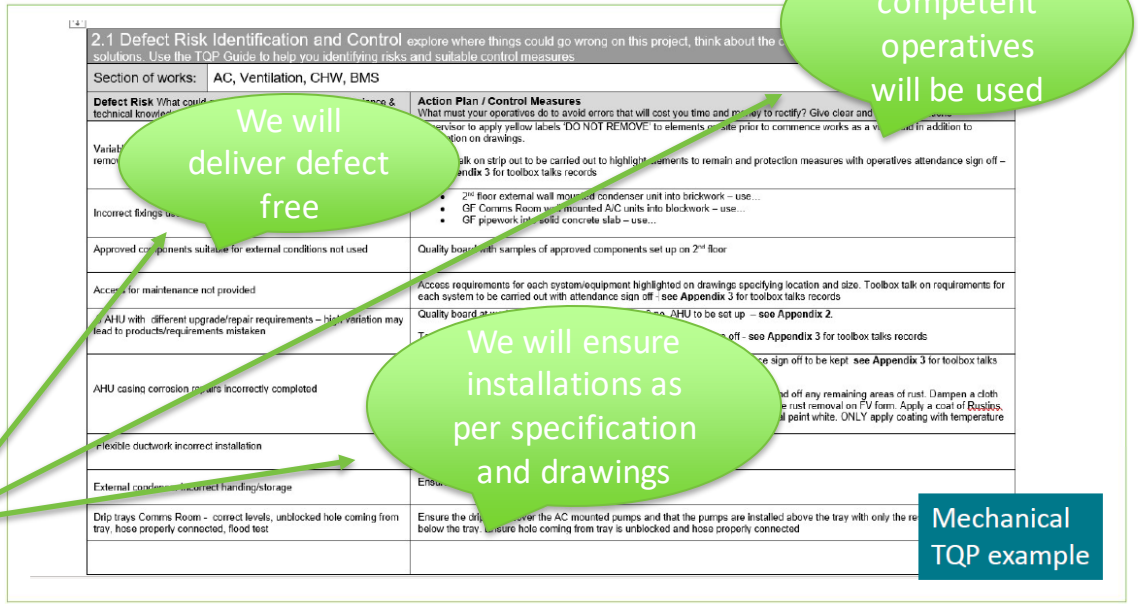
Please make use of this document!

Understanding Trade Quality Plans – ***Plan***

Plan to build right first time & avoid costly mistakes

- ✓ **Defect Risk Identification** – Brainstorming by activity/sub-activity – what could go wrong? Identify, assess and prioritise risks so you can plan control measures in advance and avoid them happening.
- ✓ **Proactive Controls / Defect Avoidance** – What must we / operatives do to avoid errors that will cost time and money to rectify? A good control measure should give details on how a risk is going to be addressed and minimised.

Are these good controls?



Understanding Trade Quality Plans – ***Plan***

Proactive Controls

Discuss

Ideas for proactive controls

Need Photos TBC

Understanding Trade Quality Plans – ***Plan***

Communication is key!

Understanding Trade Quality Plans – ***Plan***

Benchmarks / Samples / Mock-ups

Discuss

Why do we create Benchmarks / samples / mock-ups?

Understanding Trade Quality Plans – ***Prove***

Confirmation of compliant delivery

Inspection Controls – Inspection and test requirements must be defined and planned ***before the work commences*** and ***hold points identified to the workforce***.

Trade / Section Quality Plan

Confirmation of compliant delivery

Wates

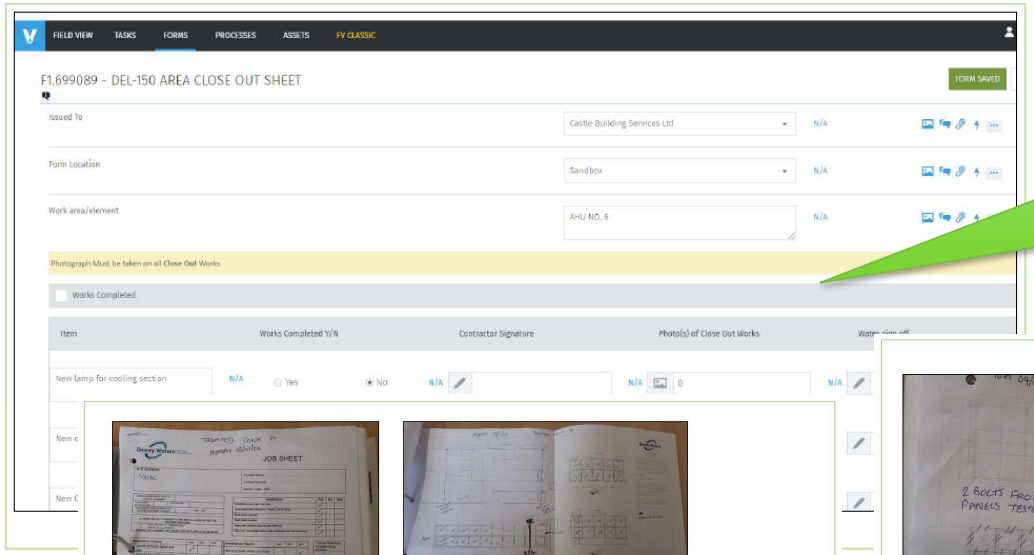
3.1 Inspection & Test Plan detail the checks that will demonstrate key elements / activities are compliant with the agreed requirements. See the TQP Guide to help you identifying the features of a good Testing & Inspection Plan

Section of works: Air Conditioning

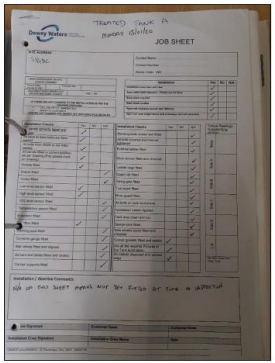
Element / Activity Hold Point As required by the Building Regulations & specification plus any Wates requirements.	**Frequency** At what stages do the hold points apply	**Accountability** Who in your organisation is accountable for ensuring the hold point is enforced and recorded	**Records** How will the inspection / test be recorded e.g. marked up drawing, photographs, check sheets, close-out sheets, snagging sheets / lists, inspections records, etc.	**Wates Inspection Required?**	**3rd Party Inspection Required?**
Concrete plinth readiness - AC Heat Pump System	Prior to install	Ben Curtis	Marked up drawing with date and Wates Manager initials as confirmation of handover	✓	☐
AC Heat Pump System install	On completion	Ben Curtis	FV inspection form 'Heat Pump' with pictures	☐	☐
Refrigeration pipework install	Prior to pressure test	Ben Curtis	FV inspection form 'Refrigeration Pipework' with photos of works and marked up drawings	☐	☐
Pipework pressure test	Prior to insulation install	Ben Curtis	Test report	☐	☐
Refrigeration pipework thermal insulation	On completion	Ben Curtis	FV inspection form 'Refrigeration Pipework' with photos of works and marked up drawings	☐	☐
External condenser	Upon install of each unit	Ben Curtis	FV inspection form 'External condenser' with photos	☐	☐
AC Indoor units, including drip tray	Upon install of each unit	Ben Curtis	FV inspection form 'AC Unit' with photos, drip tray flood test records within form	☐	☐
Labelling	Upon completion prior to commissioning	Ben Curtis	Marked up drawing with check dates and initials attached to relevant system inspection form on FV	☐	☐
Commissioning	On completion of system	Ben Curtis	Commissioning report, test reports	☐	✓

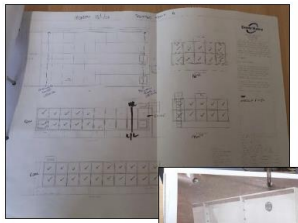
Understanding Trade Quality Plans – ***Prove***

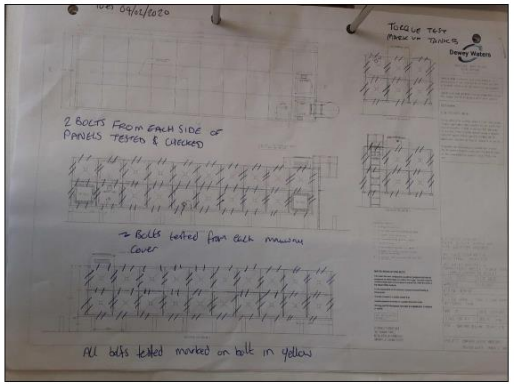
Confirmation of compliant delivery

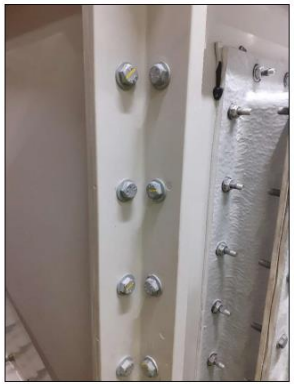


We can use Field View in a variety of ways to support recording of QA









Prove Compliant Delivery

Discussion

How does Field View support Constructing the Promise?

Discuss

Constructing the Promise – Prove Compliant Delivery

How?

Specific Quality Forms added to FV

- ✓ **Quality Control- Benchmark/Mock up inspection sheet**
  For Wates and client approval of benchmark/mock up samples such as cladding panels or brick samples
- ✓ **Supervisor Readiness Review**
  For the supply chain supervisor to sign off an area before starting their work i.e. M&E accepting ceiling and walls from ceiling and partitions company
- ✓ **Del-150 Area Close Out Sheet**
  To record QA on any areas we are closing out, particularly where works will be covered over. Can also be used to identify hold points and provide supporting evidence to each hold point (per line) such as photos, documents etc. MUST INCLUDE PHOTOS
- ✓ **General Inspection/Observation Sheet**
  This allows a subcontractor to 'raise' observations, report damage or manager snags via Field View without raising individual tasks. This may be used as a way of recording their own snags before handing over to Wates or maybe completed during the works in regards to other contractors damage to their work, or snag another
- ✓ **Supply Chain Specific Forms?**
  If s/c have their own QA forms these can be added onto Field View for them to use on site. Please ensure that these have been reviewed and align with their TQP prior to submitting to BIT Admin for uploading
- ✓ ***FV Processes*** can also be used to monitor delivery / quality - explain

Defective Works & Materials Notice

Why?

WPS-Del-27 Management of Non-conforming/Defective Works requires that a ***Defective Works and Materials Notice (Del-180)*** must be issued by Wates in the event of a ***major defect.*** It is ***important to do this using FV.***

Defective Works & Materials Process

- ✓ The **Del-180 Defective Works & Materials Notice** should be completed in FV and ***issued to S/C*** (set up a distribution list to notify relevant people)
- ✓ S/C should ***submit their proposed remedial*** works using Del-180
- ✓ You ***must obtain approval of any proposed remedial action*** from the relevant designer(s) / consultant and/or the customer if there is any deviation from the contractual requirements ***prior to rectification*** (otherwise Wates could become liable for design)
- ✓ Ensure a ***record of completed remedial works and appropriate sign offs*** (in line with Defect Close Out stages on WPS-Del-27) in Del-180
- ✓ Complete ***costs and root cause etc. of defect*** for internal analysis and if necessary cost recovery – this is ***important as costs / causes are monitored*** by the Quality Team and trends reported to ExCo

Understanding Trade Quality Plans – ***Prove***

Confirmation of compliant delivery

We must be able to prove that equipment is calibrated and record dates on and off site

Confirmation of compliant delivery

3.2 Measurement & Test Equipment Schedule use to prove fitness for purpose and compliance with the requirem

Description of Equipment	Serial Number	Validation Criteria *	Calibration Certificate Received	Re-calibration due	Date on site	Date off site	
Pressure Test Gauge	VX3356	UKAS Accredited Laboratory	✓	23/02/2022			ppendix 4 of this TQP
Temperature Sensor	56632	UKAS Accredited Laboratory	✓	15/06/2020			Appendix 4 of this TQP
Balameter	BM5632	UKAS Accredited Laboratory	✓	06/11/2021			Appendix 4 of this TQP
			☐				
			☐				
			☐				
			☐				
			☐				
			☐				
			☐				

* Validation Criteria
Where the equipment requires a Calibration Certificate it must be UKAS traceable to National Standards **a copy of the valid certificate is to be held on file.**

Focus

Understanding Trade Quality Plans – ***Prove***

Discuss

Features of a good TQP (Example Provided for reference)

Understanding Trade Quality Plans

OF Compliance – The Process

- ✓ Wates package/section manager reviews the TQP to ensure all key issues are covered using Del-093 TQP Approval for reference and then signs off ***prior*** to works commencing
- ✓ Sufficient time must be allowed for receipt of the TQP, checking and re-submission and final approval
- ✓ TQPs should be reviewed monthly by the **supply chain supervisor,** the **package or section manager** and intermittently by the **standards advisor** supporting the project. This is to ensure regular updating due to changes in resource, materials and / or procedures, or any other factor that impacts on how production quality will be achieved
- ✓ During the s/c activity you must:
  - ensure works are specification compliant and defect free
  - Photograph and / or record on marked drawings every element of works that is covered
  - Utilise FV
  - Obtain signature of witnesses where necessary
  - Ensure receipt of inspection records, certificates, test data, commissioning data and other handover deliverables prior to valuating s/c works
  - ensure that effective records are made and kept to prove compliance for up to 16 years

Field Tools and Field View

Field Tools and Field View

Why do we have Field Tools ?

- ✓ Enables Site / Section Managers to carryout their ***day to day site based activities without recourse back to the office***
- ✓ Makes it ***easier*** for people to do their jobs
- ✓ Access to ***SharePoint, Airsweb AVA*** and the ***Operating Framework*** and ***project info***
- ✓ Useful apps such as ***Quickplan Pro, Site Progress Mobile App*** and ***Bluebeam Revu***
- ✓ Reduction in Quality / Safety related incidents
- ✓ Real time ***evidence of compliance*** with SHEQ / OF requirements
- ✓ Improved ***management of subcontractor tasks***
- ✓ Ability to ***collate and report on*** data related to ***defects***
- ✓ ***Robust QA records including photos*** taken at the work face
- ✓ ***Consistent*** processes and project delivery
- ✓ Improved reputation / work winning

WPS-Gov-20 Field Tools

Field View – Start Right

Why?

- The Wates Project Lead (or designate) will provide a ***management briefing*** to all sub-contractor supervisors ***at the start of each shift or specific task*** informing them of the key deliverables and ***Quality, Safety, Health and Environmental risks*** associated with the activities and location of work
- ***Supply chain supervisors*** then turn this information into a ***briefing to their teams*** at the ***start of each shift*** or ***specific task*** and ***record on FV using Del-004 Start Right Form*** in the ***location*** the activities are to take place
- ***Easy to track*** who has done a Start Right using the ***Dashboard Filter*** in FV
- ***Reduced admin*** – no need to photocopy forms and scan and upload to SharePoint

Field View – Permits to Work

Why?

WPS-Del-06 Pre-Shift Preparations states that the manager responsible for the sub-contract package is accountable for '***Authorising named individuals to carry out specific high risk tasks by permits to work and ensuring works are properly completed and the permit is closed***'.

The Wates accountable manager ***MUST PHYSICALLY INSPECT THE WORK AREA*** to ensure it is safe to start ***PRIOR TO AUTHORISING*** a sub-contractor to commence work. A ***photograph*** must be included ***both at issue and close out*** of permits in FV

You must also include a ***THERMAL IMAGE PHOTOGRAPH*** on close out of ***HOT WORKS PERMITS***

Permits Currently in FV

- Del-023 Permit to Work - Confined Space Entry
- Del-047 Permit for Surface Penetration*
- Del-109 Permit to Work - General
- Del-110 Hot Works Permit
- Del-111 Permit to Work - Demolition
- Del-113 Permit to Activate M & E Services
- Covid-19 Permit to work within 2m*
- Del-098 Weekly Low Level Access Permit

Note: **A paper copy of Del-047 Permit for Surface Penetration and associated drawings must be in the possession of the individual carrying out the work on site.**

Benefits of Permits in FV

- ✓ Permits are supported with ***photographic*** evidence
- ✓ Provides an ***auditable trail*** which protects the company / individuals in the event of an incident or accident
- ✓ To help ***prove compliance*** and maintain record keeping
- ✓ To help ***track permits*** easily while on site
- ✓ Improves site efficiency / safety

Field View – End of Day Checklists

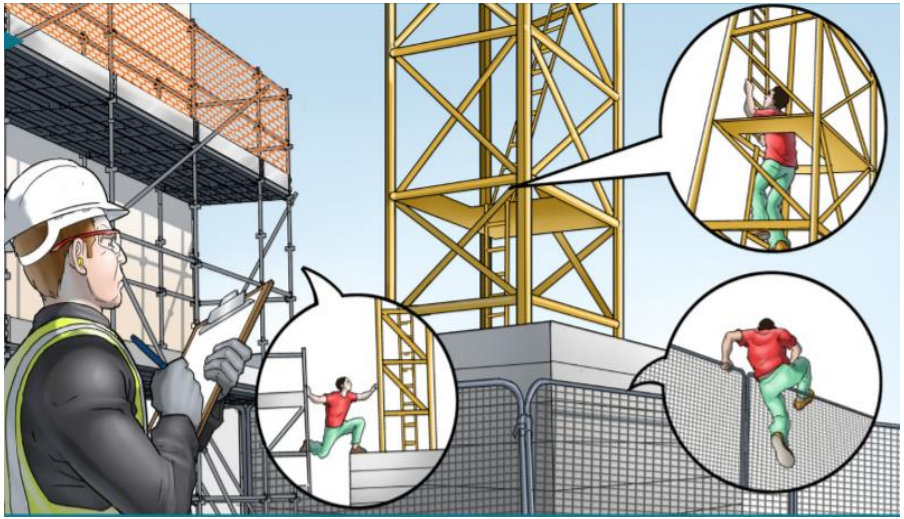
Why?

The ***Del-062 End of Day Checklist (WPS-Del-22 Audit, Monitoring & Review)*** is required to ensure the site is inspected and closed down securely and safely at the end of each day to protect the site / public.

THIS IS OUR OBLIGATION AS MAIN CONTRACTOR AND MUST BE CARRIED OUT BY A WATES MANAGER

Benefits of End of Day Checklist in FV

- ✓ To allow the ***site inspections to be carried out*** while closing down the site
- ✓ It can ***be supported with relevant photographic evidence*** to help protect the business in the event of an incident
- ✓ It has an ***auditable trail*** to help ***prove compliant delivery*** and ***maintain record keeping*** (protects the business in the event of a incident)



- ✓ Helps site efficiency by ***reducing the need to go back to the office*** to complete the relevant documentation

Field View – Daily Activity Report / Site Diary

Why?

WPS-Del-22 Audit Monitoring & Review requires that you ***'Accurately record activities, events, issues,*** including complaints and compliments and ***change to help planning and decision making***'.

What is a change?

WPS-Del-31 Managing Change defines change as **'Anything that occurs or may occur and which has the potential to change any of the following on a project or contract when compared to the planned intent and original deal:**

- The work that is to be done or not done and who is to carry it out
- The logistics, attendance or risk
- The conditions under which the work is carried out, the sequence in which it will be done or the time it will take
- The cost of doing things and the amount that will be paid in respect of them

- You should do this by means of ***Del-060C Covid-19 Specific Site Diary (one per site)*** or ***Del-059 Daily Site Activity Report (one per package manager).*** Either ***should be completed daily***.
- You should create detailed, clear and accurate records of the day's events that would be sufficient to help protect Wates in the event of a claim, dispute or request for money. It is often a contractual requirement that we keep a Site Diary of some description.
- *IMPORTANT – Think about the requirement of the form/s and ensure that you provide sufficient information to support it's intent! Always include clear photographs that accurately reflect the situation / change and the correct context*

Field View – RAMS Challenge Ongoing Review

Why?

WPS-Del-01 RAMS requires that ***RAMS are produced or received and implemented for all significant risks*** under the immediate control of Wates. Project Leads are accountable for appointing a ***competent person to review the RAMS*** and satisfying himself / herself that the review has been thorough and adequate.

- ✓ ***Del-022 RAMS Challenge*** should be completed and signed off by the Package Manager/ Competent Person and Project Lead *prior* to S/C works commencing. This is a ***desk based activity*** to be carried out using the form directly from the OF. However, the '***Safe System of Works On-going Review***' section ***is on FV***.
- ✓ A '***Show Me***' should be completed as necessary to get some ***assurance that the S/C proposed safe method works*** and that it is understood by the Supervisor and operatives *before* starting on site.
- ✓ Also going forward, '***On-going Reviews***' should be completed throughout the project as ***evidence of checks between S/C on-site practices and approved RAMS***.

General Rules / Best Practice in FV Usage

- It is ***important to think about*** the ***intent of the form*** and complete ***in line with the rules associated with the activity /task being carried out*** – **WHO? WHY? WHAT?**

(Who asked for it?, Why do we need it?, Who will use it?, Why might we refer back to it? What information do you need to include? What is the best way to record the information? Written record? Photograph? Both?)

- Ensure ***complete, accurate and clear*** records / photos
- Raise tasks within forms where needed – remember to close out the form when all associated tasks are completed
- Think about the ***digital footprint, ensure records demonstrate compliance with processes*** – What time should it happen? Who should complete / sign it?
- ***Forms can be copied***, but ensure they are ***edited to be specific*** to the day / activity being carried out
- ***Open and close forms on the day / time activity is happening*** – don't back date etc
- Carryout ***regular housekeeping*** to ensure records are kept up to date (your site Admin / FV Champion can help monitor)

If there is a FV version of an OF form you should be using it – it saves time!

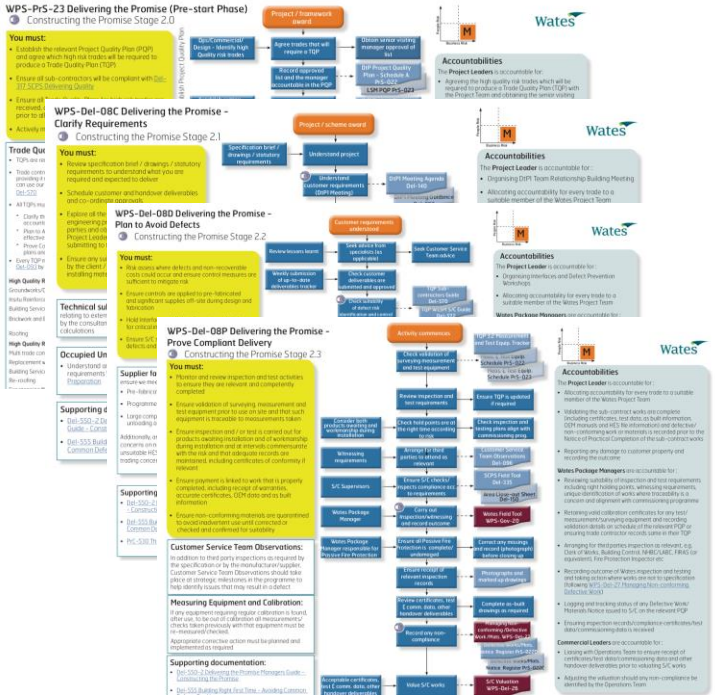
Summary

Objectives

Today we should have learnt the following:

- ✓ To understand what '***Constructing the Promise***' is, how this fits within ***Delivering the Promise*** and ***what it means for you***
- ✓ The three stages of 'Constructing the Promise' – ***Clarify, Plan & Prove***
- ✓ The ***features of a good TQP*** and how to prepare
- ✓ ***To understand*** what ***Field Tools and Field View*** are, how they support Constructing the Promise and how the company uses the software to stay compliant
- ✓ ***To understand*** some of the different ***SHEQ tasks and forms*** which can be completed on Field View and how these are done in ***compliance with the Operating Framework.***

Key Processes



- ✓ WPS PrS 23- DtP (Pre Start Phase)
- ✓ WPS PrS 25- DtP Deliver the Design
- ✓ WPS Del 08C DtP (Clarify requirements)
- ✓ WPS Del 08D DtP (Plan to avoid defects)
- ✓ WPS Del 08p DtP (Prove Compliant Delivery)
- ✓ WPS Del 40- DtP Handover
- ✓ WPS Gov 20 – Field Tools
- ✓ WPS Del 27- Management of Non Conforming/Defective works or Materials
- ✓ WPS-Gov-20 Field Tools

Key Supporting Documents

- ✓ Del 555-1 Designing the promise quick start guide
- ✓ Del 550-1 DtP Manager's Guide
- ✓ Del 555-2 Constructing the Promise Quick start guide
- ✓ Del-550-2 CtP manager's guide
- ✓ Del-555-3 Handover and aftercare quick start guide
- ✓ Del 550-3 Handover and Aftercare Manager's Guide
- ✓ Del-555 Avoiding common defects
- ✓ Del 317 SCPS Delivering Quality
- ✓ Del 335 SCPS Field View
- ✓ PrS 022 Project Quality Plan
- ✓ Del 090 Handover Deliverables schedule
- ✓ PrS 056 Plan Right
- ✓ Del 570 TQP Sub Contractor's Guide
- ✓ Del 094 TQP Template

Thank You

Any Questions