SITE survey. APP

SITE SURVEY REPORT

Health and Safety File Index

Prepared for	Wansbeck Community Halls Trust
Date	30 Sep 2026
Site	Elm Grove Community Hall refurbishment, Morpeth
Prepared by	M. Robson

FORM

Health and Safety File Index

1. Record details and scope

Project	Elm Grove Community Hall refurbishment, Morpeth: health and safety file (completed example)
Site or premises address	Elm Grove Community Hall, Elm Grove, Morpeth
Client or organisation	Wansbeck Community Halls Trust
Record date	30 Sep 2026
Person completing the record	M. Robson, principal designer, Northfell Design LLP

This is an index and handover record, not the complete health and safety file. The actual relevant information and documents must be assembled, reviewed and passed to the appropriate person.

For projects involving more than one contractor, CDM 2015 requires the principal designer to prepare a health and safety file containing information likely to be needed for health and safety during subsequent work. Regulation 12 also addresses review, updating and handover, including where the principal designer appointment ends before the project finishes. These are Great Britain duties.

2. File responsibility

Project and file reference	Elm Grove Hall refurbishment, file HSF-EG-01
Principal designer	Northfell Design LLP (M. Robson)
Principal contractor	Coquet Building Services Ltd
Client recipient	G. Armstrong, trust secretary
Information needed for foreseeable subsequent work	Roof and gutter cleaning, replacement of the main hall high-level lighting, maintenance of the new heat pump and future alterations to the stage area.

3. File contents

File item 1: As-built drawings for alterations

Subject and relevance to subsequent work	As-built drawings for alterations
Document reference and location	AB-EG-001 to AB-EG-014, folder 1
Revision and date	Rev C, 2026-09-18
Residual risk, limitation or important precaution	Stage floor void is a confined space. Access hatch marked on AB-EG-006.

Review status	Reviewed and included
Document owner	Northfell Design LLP

File item 2: Asbestos: remaining materials after refurbishment

Subject and relevance to subsequent work	Asbestos: remaining materials after refurbishment
Document reference and location	Asbestos register update AR-EG-2026, folder 2
Revision and date	2026-08-27
Residual risk, limitation or important precaution	Encapsulated asbestos insulating board behind the kitchen boiler cupboard panel. Do not drill.
Review status	Reviewed and included
Document owner	Trust secretary

File item 3: Roof access and anchor points

Subject and relevance to subsequent work	Roof access and anchor points
Document reference and location	Anchor test certificate and roof access plan, folder 3
Revision and date	Awaited
Residual risk, limitation or important precaution	Fragile roof lights on the rear slope. Use anchors only after annual test.
Review status	Outstanding
Document owner	Coquet Building Services Ltd
Review notes or reason for omission	Anchor installer has not yet issued the test certificate.

File item 4: Air source heat pump operation and maintenance

Subject and relevance to subsequent work	Air source heat pump operation and maintenance
Document reference and location	O&M manual, folder 4
Revision and date	Issue 1, 2026-09-12
Review status	Reviewed and included
Document owner	Coquet Building Services Ltd

4. Gaps and transfer

Outstanding information and agreed resolution	Roof anchor test certificate. Needed before anyone works on the roof. Coquet Building Services to obtain from the installer by 2026-10-14.

Transfer arrangements if the principal designer appointment ends early	Not needed. Principal designer appointment runs to final account.
Handover file revision	HSF-EG-01 rev A
Handover date	30 Sep 2026
Where the file is held and how it can be accessed	Paper copy in the hall office cabinet, electronic copy on the trust's shared drive. Trust secretary holds the key.
Client receipt acknowledgement	

5. Actions and review

Are further actions required?	Yes

Further action 1: Add roof anchor test certificate to folder 3 and reissue the index

Action and evidence reference	Add roof anchor test certificate to folder 3 and reissue the index
Person responsible	Coquet Building Services Ltd
Target date	14 Oct 2026
Action status	Open
Outstanding limitations and information to pass on	This index lists what is in the file. The roof anchor certificate is missing; roof work should not be planned until it is added.
Record status	Further work needed
Reviewed by	G. Armstrong
Review date	30 Sep 2026
Author signature	

> Signing records the information entered. It does not itself certify legal compliance, remove a limitation or authorise unsafe work.