



BEAR Scotland

M80 Stepps to Haggs DBFO Contract
M80 Motorway and M80-M73 Link Road

Quality Plan



M80 Steps to Haggs DBFO
Quality Plan
 (O&M and Major Maintenance)



DOCUMENT APPROVAL / AUTHORISATION

	Name	Date
Originally Prepared By	[REDACTED]	January 2009
Originally Checked By	[REDACTED]	January 2009
Originally Authorised By	[REDACTED]	January 2009

REVISION STATUS

REVISION STATUS				
Rev.	Date	Revision Details	Checked	Authorised
1	January 2009	Initial Quality Plan submitted at Tender Stage	[REDACTED]	[REDACTED]
2	February 2010	Revised Quality Plan to fully reflect Schedule 5	[REDACTED]	[REDACTED]
3	June 2010	Revised Quality Plan to reflect comments made by	[REDACTED]	[REDACTED]
4	January 2011	Revised for Full Services – Issue 1	[REDACTED]	[REDACTED]
5.	July 2011	Revised following JE Comments – Issue 2	[REDACTED]	[REDACTED]
6.	July 2012	Additional procedures referenced - Issue 3	[REDACTED]	[REDACTED]
7.	August 2012	Sector Scheme referenced – Issue 4	[REDACTED]	[REDACTED]
8	August 2012	Scottish Ministers Representatives comments	[REDACTED]	[REDACTED]
9	January 2013	Addition of Major Maintenance –Issue 6	[REDACTED]	[REDACTED]
10	April 2013	Updates – Issue 7	[REDACTED]	[REDACTED]
11	April 2013	Updates – Issue 8	[REDACTED]	[REDACTED]
12	July 2013	Updates – Issue 9	[REDACTED]	[REDACTED]
13	Nov 2013	Updates – Issue 10 & 11	[REDACTED]	[REDACTED]
14	April 2014	Minor Update – Issue 12	[REDACTED]	[REDACTED]
15	July 2015	Updates – Issue 13	[REDACTED]	[REDACTED]
16	Nov 2015	Minor updates from JE comments – Issue 14	[REDACTED]	[REDACTED]
17	March 2017	Updates to reflect personnel changes – Issue 15	[REDACTED]	[REDACTED]
18	May 2017	Updates to reflect PAG comments – Issue 16	[REDACTED]	[REDACTED]
19	Oct 2017	Updates (internal review) – Issue 17	[REDACTED]	[REDACTED]

M80 Steps to Higgs DBFO
Quality Plan
(O&M and Major Maintenance)



REGISTER OF CONTROLLED COPIES

Ref.	Name of Holder	Designation	Company
1	[REDACTED]	M80 DBFO Project Director	BEAR Scotland
2	[REDACTED]	M80 DBFO Asset Manager	BEAR Scotland
3	[REDACTED]	M80 DBFO Project Manager	BEAR Scotland
4	[REDACTED]	M80 DBFO Operational Manager	BEAR Scotland
5	[REDACTED]	M80 DBFO Health & Safety Manager	BEAR Scotland
6	[REDACTED]	M80 DBFO Quality & Environmental Manager	BEAR Scotland
7	[REDACTED]	HMG General Manager	HMG
9	[REDACTED]	Scottish Minister's Site Representative	PAG
10	[REDACTED]	Scottish Minister's Agent	PAG
11	[REDACTED]	Project Quality Director	CPC
12	[REDACTED]	M80DBFO Area Manager	Transport Scotland



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GENERAL REQUIREMENTS

(Schedule 5 Clause 1 & O&M Schedule 5 Clause 1)

This Quality Plan is aligned with the requirements of the following;
M80 DBFO O&M Works Agreement – Schedule 5 (Sections 1 – 9)
M80DBFO Major Maintenance Consultancy Agreement
M80 DBFO Contract – Schedule 5 (Sections 1 – 14)
BS ISO 10005: – Guidelines for Quality Plans

1.1 Quality Plan – Control

- 1.1.1 Where this plan refers to BEAR Scotland, this should be read as the Company.
- 1.1.2 BEAR Scotland shall institute, maintain and operate a quality system (the "**Quality System**") complying with the requirements of Schedule 5 for the purpose of ensuring and demonstrating that all aspects of the O&M Works Agreement and all other matters for which BEAR Scotland is responsible under the DBFO Contract.
- 1.1.3 BEAR Scotland shall operate in accordance with this Quality Plan comprising and aligned to the parts identified in and meeting but not limited to the requirements specified in Schedule 5. Notwithstanding any other provisions of the DBFO Contract this Quality Plan includes or make reference to the location of documents describing organisational structure, management arrangements, responsibilities/authorities and documented procedures for the delivery of the operations and maintenance requirements, and the preparation distribution and storage of quality and other records specified by the Contract and relevant standards.
- 1.1.4 BEAR Scotland shall ensure that sub-contractors and orders for goods and services, including design services, shall institute, maintain and operate for the term of the DBFO Contract, as appropriate, a Quality System complying with the requirements of:
- (i) BS EN ISO 9001:
 - (ii) BS EN ISO 14001:
 - (iii) OHSAS 18001: and
 - (iv) the Contract

for the purpose of ensuring and demonstrating that the services or goods provided conform to the relevant provisions of the DBFO Contract. A condition shall also be made within each and every sub-contract to provide access for HMG and the Scottish Ministers via HMG and facilities of a standard sufficient to enable HMG and the Scottish Ministers via HMG to take such actions as it may consider necessary.

Where this Quality Plan relies on a quality plan from sub-contractors then BEAR Scotland shall identify within the Quality Plan the specific responsibilities assigned to these organisations so as to ensure that the requirements of the Quality Plan as described in Schedule 5 of the DBFO Contract are fully satisfied by the individual quality plans and supporting documentation. Where necessary our contractors and suppliers shall utilise the BEAR Scotland Quality system. All subcontractors shall provide the same access as BEAR Scotland to HMG, and the Scottish Ministers



via HMG and their representatives. Approved supply chain organisations shall be detailed within our approved registers.

The identification of management system contractual requirements for compliance with the M80 DBFO – O&M Works Requirements is specified through the interpretation of the following documentation:

- Schedule 4: O&M Works Requirements, Part 5 (Specification)
- Specification for Highway Works – Appendix A
 - Appendix A (pages 1, 6 to 20 and 22 to 25F) issue November 2006
 - Appendix A (pages 2 to 5 and 21) issue May 2007

The following National Highway Sector Scheme (NHSS) requirements are identified as applicable in relation to the M80 DBFO – O&M Works Requirements:

- NHSS 2A (Subcontract)
- NHSS 2B
- NHSS 5B (Subcontract)
- NHSS 8
- NHSS 12AB
- NHSS 18
- NHSS 21 (Subcontract)

Information relating to NHSS accreditation status and specified requirements shall be accessed on the UKAS website (www.ukas.com)

Amendments to NHSS requirements generally relate to training requirements or the administration process. They seldom, if ever, involve technical amendments that might have implications for compliance with the M80DBFO contract requirements. However, to ensure on-going compliance with the contract requirements, each applicable sector scheme will be reviewed on a regular basis. Should any amendments involve a technical change or conflict with the contract requirements, BEAR will bring the matter to the attention of HMG and seek agreement on how to proceed. Where appropriate, BEAR will submit proposals to HMG for them to pursue a Company Change with Transport Scotland if they so wish. HMG will inform BEAR of the outcome and they, in turn, will inform their relevant subcontractors.

Any amendments or interim amendments relating to the *Specification for Highway Works* published by HMSO as *Volume 1 of the MCDHW* can only be implemented by BEAR in any Routine Maintenance or Major Maintenance activities if the following criteria apply:

- (i) BEAR considers there to be potential benefit to Transport Scotland from implementing the amendment;
- (ii) BEAR discusses and secures the agreement of HMG to propose the implementation of the amendment;
- (iii) HMG secures the agreement of Transport Scotland to propose the amendment;
- (iv) BEAR provides a detailed submission to HMG to allow them to develop and put forward a Company Change to Transport Scotland;
- (v) HMG submits a Company Change to Transport Scotland for approval.



Only if a Contract Change is approved by Transport Scotland will the amendment be implemented and BEAR's relevant subcontractors informed as necessary.

All sub-contracted activities are undertaken by organisations contained within the BEAR Scotland approved subcontractor register held on the Sharepoint intranet.

Others will be complied with by procuring the work from a subcontractor or supplier to work in accordance with the relevant scheme and who hold UKAS Accredited Certification. Updates to Sector schemes shall be provided to HMG as they become available through the UKAS website and the Specification for Highway Works.

- 1.1.5 BEAR Scotland shall not commence or permit the commencement of any aspect of the Operations or any other matters within our responsibility of the DBFO Contract before those parts of the Quality Plan revision has at least been agreed in principle with HMG, prior to release within the BEAR Scotland Management System.
- 1.1.6 The part of the Quality Plan concerning the management and/or carrying out of the O&M Works in respect of any part of the Site Roads or New Roads shall be completed in all material respects at least 4 weeks (or such shorter period as the parties may agree) prior to the date on which the O&M Works in respect of such part of the Site Roads or New Roads are to commence.
- 1.1.7 BEAR Scotland shall notify HMG in advance of any changes to the Quality Plan to continue to comply with the requirements as specified in Schedule 5.
- 1.1.8 If BEAR Scotland fails to propose any change required pursuant to paragraph 1.1.6, then the HMG may propose such change and it shall be dealt with as though it had been proposed by BEAR Scotland. Can also be requested by the Scottish Ministers via HMG.
- 1.1.9 The BEAR Scotland DBFO Contract Staff Structure is detailed as follows:

BEAR Scotland Ltd will employ the following persons, consultants and contractors: -
 - a) **The M80 DBFO Project Director/ The Consultant's Representative.** These will be part-time roles. The M80DBFO Project Director/ Consultants Representative will be responsible for the overall implementation of the Project.
 - b) **The M80 DBFO Operational Manager.** This will be a dedicated full-time role. The M80 DBFO Operational Manager will report to the Project Manager and will be responsible for the day to day management of the M80 DBFO to enable the obligations and responsibilities of the O&M Works Requirements to be satisfied.
 - c) **The M80 DBFO Project Manager.** This will be a part-time role. The M80DBFO Project Manager will be responsible for the overall implementation of the O&M Works. The M80 DBFO Project Manager will report to the Project Director.
 - d) **The M80 DBFO Asset Manager** This will be a part-time role. The M80DBFO Asset Manager will be responsible for the Maintenance Management Plan and Major Maintenance compliance. The M80 DBFO Asset Manager will report to the Project Director/ Consultants Representative as regards planning and execution of major maintenance.



- e) **The M80 DBFO Network Engineer.** This will be a dedicated full-time role. The M80 DBFO Network Engineer will report to the Operational Manager and assist in the day to administration of the O&M Works Requirements.
- f) **The M80 DBFO Quality and Environmental Manager.** Is responsible for the Quality and Environmental Management within the business.
- g) **The M80 DBFO Network Technician.** This will be a dedicated full time role. The M80 DBFO Network Technician will report to the M80DBFO Operational Manager.
- h) **The M80 DBFO Structures Engineer.** This will be a part-time role.
- i) **The M80 DBFO Health and Safety Manager.** This will be a part-time role.
- j) **The M80 DBFO Winter Service Duty Officer.** This will a part-time role and will be resourced from Winter Service Duty Officers within BEAR Scotland's team.
- k) **The M80 DBFO IRIS Co-ordinator.** This role will be held by the M80 DBFO Network Engineer.
- l) **The M80 DBFO Traffic Officer.** This role will be held by the M80 DBFO Operational Manager.
- m) **The M80 DBFO Abnormal Load Manager.** This role will be held will by the M80 DBFO Structures Engineer.
- n) **The M80 DBFO Public Liaison Officer.** This role will be held by the M80 DBFO Operational Manager.
- o) **Emergency Liaison Officers.** These roles will be resourced by staff within BEAR Scotland's control room
- p) **The M80 DBFO Customer Contact Operators** to be based at the Perth Office.
- q) **The M80 DBFO Signing Applications Officer.** This will be a part-time role and will be held by the M80 DBFO Network Engineer.
- r) **The M80 DBFO Planning Applications Officer.** This will be a part-time role and will be held by the M80 DBFO Network Engineer.
- s) **Technical and inspection personnel** necessary to undertake the Contractual requirements of the O&M Works Requirements. Inspection personnel will be trained in order to effectively undertake safety inspections, safety patrols and detailed inspections as directed by the M80 DBFO Operational Manager.
- t) **Additional personnel** as required from BEAR Scotland Ltd's core business team, based within BEAR Scotland Ltd's offices in Perth. BEAR Scotland Ltd has a range of staff experienced in the management and maintenance of Trunk Roads including but not limited to:
 - A Consultancy Service under the direction of the Asset Manager, consisting of approximately 40 staff, undertaking a range of professional services including design, investigative, supervisory and major maintenance works.

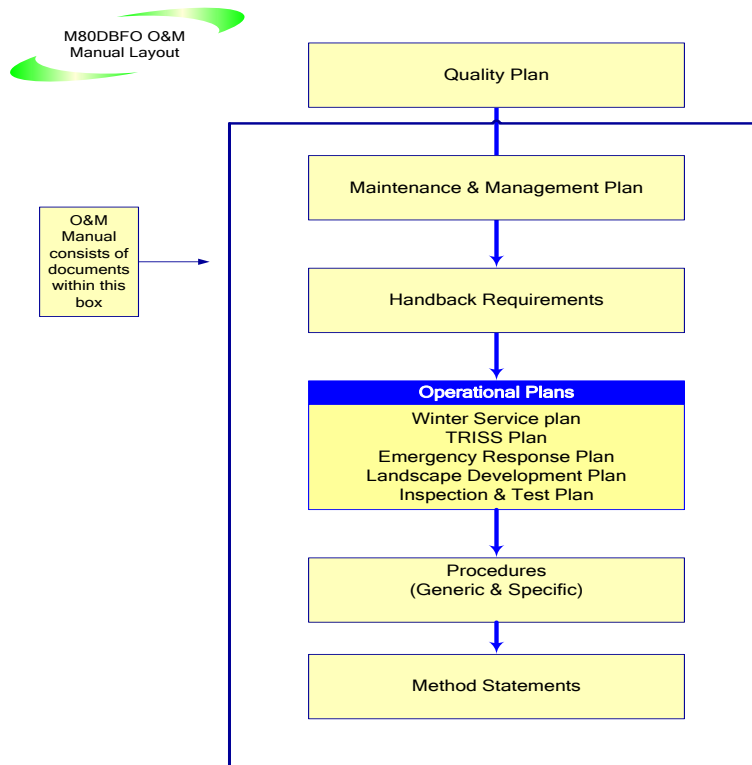


- A Design team (including the Design Engineer) who will carry out the Management of the Major Maintenance Schemes under the guidance of the Asset Manager who is responsible for this process.
- A Structures Team employing dedicated staff, responsible for the management and maintenance of the structures throughout the North East and North West trunk road networks.
- An Integrated Management Systems (IMS) Team, covering Quality, Environment and Health & Safety operating under the direction of the Integrated Management Systems (IMS) Manager (Mark Gibson). BEAR Scotland Ltd is certified to ISO 9001:, ISO 14001:, OHSAS 18001:.
- An Operations team under the direction of the Operational Manager who are responsible and experienced in a wide range of Operational matters including winter maintenance, reactive maintenance, emergency response etc.
- A Lighting and Electrical Team operating under the control of the Electrical Manager, employing a dedicated team of staff with expertise in the installation and maintenance of electrical and lighting systems.
- A Landscaping Team operating under the control of the Landscaping Senior Manager, employing a dedicated team of staff with expertise in the field of landscape maintenance.

1.2 Documentation

- 1.2.1 BEAR Scotland operates a Sharepoint Intranet system (BEARnet) encompassing our management system contents. This system contains both generic and contract specific documentation. The Quality Plan and the associated documents will be maintained as to comply with the requirements specified in Schedule 5 Clause 1.2.

The diagram below illustrates the documentation structure for the delivery of the O&M:



- 1.2.2 BEAR Scotland shall submit all necessary new procedures or procedures with significant process changes to HMG for review prior to use and before sending them to the Scottish Ministers Representatives for approval. HMG shall also be copied into all submissions to the Scottish Ministers Representatives for approval.
- 1.2.3 The table below provides a cross reference matrix to reflect and support the delivery of services as defined in Schedule 4 and the Major maintenance Agreement:



<u>Activity</u>	<u>BEAR Scotland – Document(s)</u>
Design Control (Sch 4 pt1 sect 2 & Sch 4 pt4 & Sch 4 pt6)	Design Control Procedure
Defined posts (Sch 4 pt1 sect 3)	Maintenance Management Plan
O&M Manual (Sch 4 pt1 sect 3)	O&M Manual & Contents Register
Provision of records and Information (Sch 4 pt1 sect 4)	Provision of Records and Information Procedure
Disruption during Services Period (Sch 4 pt1 sect 5)	Traffic Management Procedures (12AB & 12C), TTRO Procedure, Network Access Procedure. Design Procedure, NRSWA Procedure, Lane Unavailability Procedure.
TTMS (Sch 4 pt1 sect 6)	Traffic Management Procedures (12AB & 12C), TTRO procedure, Network Access Procedure.
Land made available (Sch 4 pt1 sect 7)	Design Control Procedure Communication and Correspondence Procedure
Licences Approvals and Otherwise (Sch 4 pt1 sect 8)	Design Control Procedure
Access (Sch 4 pt1 sect 9)	Design Control Procedure Management of Bridges and Other Structures Procedure
Orders (Sch 4 pt1 sect 10)	Design Control Procedure Environmental Procedure
Accesses and rights of Way (Sch 4 pt1 sect 11)	Design Control Procedure Communication and Correspondence Procedure
Community and Public Liaison (Sch 4 pt1 sect 12)	Communication and Correspondence Procedure Design Control Procedure
Payment of Fees & Undertaker Compliance (Sch 4 pt1 sect 13)	Network Access Procedure
Superintendence by Company (Sch 4 pt1 sect 14)	Maintenance Management Plan Risk Assessment Procedure
Data Collection (Sch 4 pt1 sect 15)	Maintenance Management Plan Network Inspections Procedure MSD Procedure
Abnormal Indivisible Load Routeing (Sch 4 pt1 sect 16)	Abnormal Loads Procedure
Emergency Response service (Sch 4 pt1 sect 17)	Emergency Response Plan and associated Method Statements Ad Hoc Inspections Procedure
Road Safety Audits (Sch 4 pt1 sect 18)	Road Safety Audit Procedure
Departures (Sch 4 pt1 sect 19)	Design Control Procedure



<u>Activity</u>	<u>BEAR Scotland – Document(s)</u>
Trunk Road Cycle Audit (Sch 4 pt1 sect 20)	Road Safety Audit Procedure
Noise Surveys (Sch 4 pt1 sect 21)	Noise Survey data (To be carried out years 1, 5, 10 and 15) Control of Noise at Work Procedure
Defects and Damage (Sch 4 pt1 sect 22)	Network Inspections Procedure
Shared Electrical Facilities (Sch 4 pt1 sect 23)	Management of Electrical Installations Procedure
Planning Applications (Sch 4 pt1 sect 24)	Development Control Procedure
Customer Contact Service (Sch 4 pt1 sect 26)	Customer Contact Service Procedure Communication and Correspondence Procedure
Correspondence etc (Sch 4 pt1 sect 27)	Correspondence Procedure Communications Register
Maintenance and Management Plan (Sch 4 pt1 sect 28)	Maintenance and Management Plan
Signing (Sch 4 pt1 sect 29)	Signing Procedure
Energy consumption (Sch 4 pt1 sect 30)	Maintenance Management Plan
Third Party Claims (Sch 4 pt1 sect 31)	Third Party Claims Procedure Damage to Crown Property Procedure
TRISS (Sch 4 pt1 sect 32)	TRISS Plan, Procedure and associated Method Statements Control Room Procedure
Superficial Structures Inspections (Sch 4 pt2)	Management of Structures Procedure
Scottish Ministers Observations (Sch 4 pt2)	Scottish Ministers Observations Procedure
Winter Service (Sch 4 pt2)	Winter Service Plan and associated Method Statements Control Room Procedure
Cyclic maintenance – Electrical (Sch 4 pt2)	Electrical Cyclic Procedure Maintenance Management Plan
Cyclic maintenance – Operations (Sch 4 pt2)	Operations Cyclic Procedure Maintenance Management Plan
Cyclic maintenance – Landscape (Sch 4 pt2)	Landscape Maintenance Procedure & Programme Maintenance Management Plan



<u>Activity</u>	<u>BEAR Scotland – Document(s)</u>	
Cyclic maintenance – Structures (Sch 4 pt2)	Structures Cyclic Procedure & Programme Maintenance Management Plan	
Flooding (Sch 4 pt2)	Flooding Procedure Network Inspection Procedure	
Vehicle & Pedestrian Restraint Systems (Sch 4 pt2)	Network Inspection Procedure Maintenance Management Plan VRS Procedures	
Routine Maintenance – CAT1 & 2s (Sch 4 pt2)	Network Inspection Procedure Ad hoc Inspection Procedure	
Safety Inspections & Patrols Detailed Inspections (Sch4 Pt2)	Network Inspection Procedure Ad hoc Inspection Procedure	
Landscape Maintenance (Sch 4 pt2)	Landscape Maintenance Procedure Landscape Plan	
Traffic Counting (Sch 4 pt2)	Traffic Counting Procedure	
Traffic Scotland (Sch4 pt2)	Traffic Scotland Procedure Management of Electrical Installations	
NRSWA/ Liaising with Police & Statutory Undertakers/ Coordinating roadworks (Sch 4 pt2)	NRSWA (1991) Procedure Network Access Procedure TTRO procedure Traffic Orders Procedure Liaison Procedure	
Handback details (Sch 4 pt3)	Handback Plan	
Certification (Sch 4 pt6)	Controlled Certificates Design Procedure	
Reporting & Submissions (Sch 4 pt7)	Reporting & Submissions Procedure of Records Procedure	Control
Liaison (Sch 4 pt9)	Maintenance Management Plan Liaison Procedure	
Management Systems (Schedule 5)	Various	
Lane unavailability (Schedule 6)	Lane Unavailability Plan	
Shortfall Deductions	Shortfall Deductions Procedure	
Major Maintenance Agreement	Major Maintenance Overview Procedure, Maintenance Management Plan, Major Maintenance programming Managing for Major Maintenance, Tendering for Major Maintenance Design Procedure including Project Execution Plan (PEP), CDM procedure.	



<u>Activity</u>	<u>BEAR Scotland – Document(s)</u>
	<p>Environmental Screening procedure Drawing Control procedure</p> <p>There are a number of procedures from Schedule 4 which also impact upon Major Maintenance. This includes but is not limited to:</p> <p>Network Inspection procedure NRSWA procedure Network Access procedure Liaison procedure Lane Unavailability Plan Shortfall deductions procedure Management of Structures procedure</p> <p>This also includes the various procedures which are required by the Management Systems and Schedule 5</p>

1.3 Project Quality Director (PQD)

1.3.1 The Company shall appoint a Project Quality Director, who shall be independent of the project management team. BEAR Scotland shall liaise and provide sufficient resources to enable the Project Quality Director to undertake the duties defined within the DBFO Contract, as detailed below;

- (i) ensure the effective operation of the Quality System;
- (ii) audit the Quality System at regular intervals and report the findings of such audit to the Scottish Ministers;
- (iii) review the Quality System at intervals reasonably required by the Scottish Ministers to ensure its continued suitability and effectiveness; and
- (iv) consult and cooperate with the Scottish Ministers on all matters relating to quality management.

1.4 Quality Monitoring

1.4.1 BEAR Scotland shall liaise and provide sufficient resources to enable the Scottish Ministers via HMG or any authorised agent to undertake audits as and when advised and carry out other duties, where required, defined within the DBFO Contract, as detailed in Schedule 5, Section 1.4

1.5 Materials and Workmanship, Samples and Testing

1.5.1 All materials and workmanship shall be of the respective kinds described in the Contract and shall be subjected to the samples and tests defined by the Inspection & Test Plans to demonstrate compliance with respect to the DBFO Contract requirements.

1.5.2 All samples and testing shall be undertaken by a laboratory holding accreditation to BS EN ISO/IEC 17025:2005 in respect of their activity, except as provided



otherwise by the agreement. The document applicable to these requirements is Control of Labs, Material Sampling and Testing, M80DBFO-P01.

- 1.5.3 A schedule of Inspections & Tests planned for each part of the Operations shall be provided by BEAR Scotland to HMG prior to carrying out each such part of the Operations. The document applicable to these requirements is the Inspection & Test Plan which shall be provided by the Principal Contractor.
- 1.5.4 If required by the Scottish Ministers via HMG, BEAR Scotland shall:
- (i) provide to the Scottish Ministers via HMG such assistance, instruments, machines, labour and materials as required for examining, measuring and testing any work and the quality of any materials used in any part of the Operations; and
 - (ii) supply to the Scottish Ministers via HMG for testing samples of material before incorporation in the O&M Works, at the Scottish Ministers' expense (except where such examination, measurement or testing discloses that such work or materials do not comply with the requirements of this DBFO Contract in which case such provision or supply shall be at BEAR Scotland's expense).
- 1.5.5 All Measuring and Monitoring equipment which can affect the quality of the final product or service shall be calibrated to UKAS traceable standards. The document applicable to these requirements is the Control of Monitoring and Measuring Devices, Ref: Proc-028.

1.6 Additional Information

- 1.6.1 BEAR Scotland shall provide information in relation to the requirements of Schedule 5 as reasonably required by the Scottish Ministers via HMG.

2.0 PRINCIPAL REQUIREMENTS OF THE O&M WORKS QUALITY PLAN (Schedule 5 Clause 2 & O&M Schedule 5 Clause 2)

- 2.1 This Quality Plan has been developed in conjunction with principal requirements as specified in the appropriate paragraphs contained within Schedule 5.
- 2.2 BEAR Scotland shall define any requirements for Quality Witness and Hold Points within the Inspection and Test Plans for each activity as detailed in the Inspection & Test Plan, Ref: M80DBFO-InspTest Plan.
- 2.3 BEAR Scotland shall manage the process to produce quality records through the documented procedures and O&M Manual. The key document for this requirement is the Provision of Records and Information, Ref: M80DBFO-P27 and the Deliverables Matrix contained within the Maintenance and Management Plan.
- 2.4 BEAR Scotland shall produce an Internal Audit Programme encompassing the full scope of the O&M contract; requirements as defined in Schedule 4, Part 1, with a minimum audit frequency of 3 months, resulting in the audit programme being completed within a 12 month period. The documented procedure for this requirement is Management Systems auditing, Ref: M80DBFO-P28.
- 2.5 New Works is not applicable for O&M Works



3.0 MONITORING OF THE O&M WORKS CONTRACTOR'S QUALITY SYSTEM (Schedule 5 Clause 3 & O&M Schedule 5 Clause 3)

- 3.1 BEAR Scotland shall take due cognisance of any non-conformities received, investigate the cause, take all corrective action, initiate action required to prevent recurrence and integrate same into our Quality Management System. Associated documents shall be reviewed and amended as necessary. The documented procedure for this requirement is Non-conformance Control, Ref: Proc-030
- 3.2 Various formal meetings are held between different parties to monitor progress of the DBFO Contract. These are listed in detail in the liaison procedure (M80DBFO-P41). These include: -
- (i) HMG Progress meetings
 - (ii) Interface Meeting with New Works Contractor
 - (iii) Scottish Ministers Progress meetings
 - (iv) IRIS User group meetings
 - (v) RAUC meetings
 - (vi) Local Authority and Police liaison meetings
 - (vii) Safety camera partnership meetings
 - (viii) Road safety group meetings
 - (ix) Stakeholder inc Community liaison meetings
 - (x) Various BEAR internal meetings relating to this contract (including monthly Operations and Senior Management Team Review meetings)
 - (xi) Adhoc meetings
 - (xii) Internal liaison and communication

4.0 OVERALL MANAGEMENT OF THE OPERATIONS (Schedule 5 Clause 4 & O&M Schedule 5 Clause 4)

- 4.1 Refer to the Maintenance and Management Plan for the names, roles, responsibilities and authority of the key personnel that are employed in the administration of the Operations including the line of communication links between all parties involved in the delivery of the Operations by BEAR Scotland. Also refer to the organization chart in clause 1.1.9 of this Quality Plan.
- 4.2 All relevant procedures required to maintain our certification for the effective overall management and co-ordination of the project by means of Quality Systems



complying with, BS EN ISO 9001:2008, BS EN ISO 14001:2004 and OHSAS 18001:2007 are held within our Sharepoint Intranet.

The following key documents are also included;

- Supply Chain Management and Review, Ref: Proc-013 for the procurement of all services required for the Operations.
- BEAR Handback Requirements Ref: M80DBFO-Handback Plan for the achievement of the Handback Requirements and also the Maintenance and Management Plan, Ref: M80DBFO-Maintenance and Management Plan.
- Provision of Records and Information, Ref: M80DBFO-P27 for the comprehensive records of the Operations.

- 4.3 Refer to the Maintenance and Management Plan for details of BEAR Scotland staff responsible for overseeing each activity in respect of the Operations. Overall responsibility for the delivery of BEAR Scotland's Operation and Maintenance obligations rests with the Project Director. The Project Director is responsible for ensuring that sufficient staff, labour and resources are available in order to fulfil the DBFO Contract obligations.
- 4.4 The management of our supply chain is contained within the procedure Supply Chain Management and Review, Ref: Proc-013, which includes the assessment and control of sub-contractors encompassing their quality system and quality control capabilities to enable all obligations to be fulfilled.
- 4.5 BEAR Scotland shall submit all necessary documentation to HMG for review and approval prior to the activity commencing. Any significant updates to these documents shall also be communicated to the HMG for approval. This shall be controlled through our Sharepoint Intranet (BEARnet). The documented procedure for this requirement is Document Control, Ref: M80DBFO-P19.
- 4.6 Documented procedures for Management Reviews and audits to monitor and demonstrate control over the implementation of the Quality Plan are contained within the Sharepoint Intranet system.

The documented procedures for this requirement are detailed below;

- Management Review, Ref: Proc-24
 - Management Systems Auditing, Ref: M80DBFO-P28
 - Management Systems Activity Process, Ref: Proc-50
- 4.7 BEAR Scotland shall hold all documentation at relevant offices and depots associated with the DBFO Contract, which will be made available for inspection or audit by or on behalf of the Scottish Ministers. This requirement is documented in the procedure Provision of Records and Information, Ref: M80DBFO-P27.
- 4.8 BEAR Scotland shall produce a programme, where required, to ensure that documentation is submitted in sufficient time prior to activities for that operation



being undertaken, which will be incorporated into the Quality Plan. The M80DBFO Review Register shall be used as the programme.

- 4.9 BEAR Scotland shall produce documentation to fulfill the following requirements;
- (i) Documentation to provide effective administration and procurement of all activities of the Operations;
 - (a) The arrangement for liaison and meetings with our supply chain and HMG and the Scottish Ministers personnel via HMG associated with the DBFO Contract is detailed in section 3.2 of this Quality Plan. The procedures for this requirement is Communication and Correspondence, (M80DBFO-P04) and the Liaison procedure (M80DBFO-P41)
 - (b) The arrangement for the control of personnel selection, based on competence through the consideration of skill, care, qualification, training and experience is contained within procedures Recruitment, Ref: Proc-85 and Training, Ref: Proc-90;
 - (c) The O&M Project Quality Manager is the person responsible for the initiation and updating of the Quality Plan during the New Works and Service Period as detailed in procedure Document Control, Ref: M80DBFO-P19;
 - (d) The O&M Project Quality Manager is also responsible for monitoring compliance with the Quality Plan in respect of the Operations through the Management Systems Auditing, Ref: M80DBFO-P28
 - (e) The O&M Project Quality Manager is also responsible for the adequacy of quality records produced as detailed in procedure Provision of Records and Information, Ref: M80DBFO-P27;
 - (e) The O&M Project Quality Manager is the person responsible for ensuring the implementation of document control activities as specified in the DBFO Contract in respect of the Operations as detailed in procedure Document Control, Ref: M80DBFO-P19.
- 4.10 BEAR Scotland shall fulfill its obligations with respect to the supply of information and records as specified in the deliverables matrix, contained within the Maintenance and Management Plan.
- 4.11 BEAR Scotland shall provide any additional information that may be brought to the attention of HMG or the Scottish Ministers via HMG, which will be incorporated into the Quality Plan.
- 4.12 Documentation shall be identified as follows:
- (a) Generic documents

These are standard BEAR procedures and have no need to make specific reference to the M80DBFO Contract.
 - (b) Specific documents
 - a. Those generated from modified generic procedures shall have the postscript “-M80DBFO”

Reference should also be made to the Document Control procedure (M80DBFO-P19) for specific information.

5.0 TECHNICAL STUDIES AND ADVICE IN CONNECTION WITH THE OPERATIONS (Schedule 5 Clause 5 & O&M Schedule 5 Clause 5)

5.1 This part of the Quality Plan for the provision of technical studies and advice in connection with the Operations shall include but not be limited to the provision of the following:

5.1.1 Refer to the Maintenance and Management Plan for the names, roles, responsibilities and authority of the key personnel that are employed in the provision of technical studies and advice in connection with the Operations including the line of communication links between all parties involved in the delivery of technical studies and advice in connections with the Operations by BEAR Scotland. Also refer to the organization chart in clause 1.1.9 of this Quality Plan.

5.1.2 The arrangement for liaison and meetings with the Scottish Ministers personnel associated with the DBFO Contract is detailed in section 3.2 of this Quality Plan.

5.1.3 The Project Quality Director will have access to all DBFO Contract related documents, including records to undertake an evaluation of BEAR Scotland's compliance with respect to the DBFO Contract.

5.1.4 BEAR Scotland shall provide documentation to manage the processes applying to the following;

- Documentation for the effective provision of technical studies and advice in connection with the Operations in contained within procedure Design Control, Ref: M80DBFO-P18
- Documentation for the procurement of all services and works required for technical studies and advice in connection with the Operations, including;
- The arrangement for the control of personnel selection, based on competence through the consideration of skill, care, qualification, training and experience is contained within the procedures Recruitment, Ref: Proc-85 and Training, Ref: Proc-90
- The O&M Project Quality Manager is the person responsible for the initiation and updating of the Quality Plan throughout the Project;
 - (i) The O&M Project Quality Manager is the person responsible for monitoring compliance with the Quality Plan in respect of the Operations through the Management Systems Auditing, Ref: M80DBFO-P28.
 - (ii) The O&M Projects Quality Manager is the person responsible for the adequacy of the quality records produced as detailed in the procure Provision of Records and Information, Ref: M80DBFO-P27;
 - (iii) The O&M Project Quality Manager is the person responsible for the document control requirements in respect of Operations. The procedure for this requirement is Document Control, Ref M80DBFO-P19



5.1.5 BEAR Scotland shall fulfill its obligations with respect to the supply of information and records as specified in the deliverables matrix which is contained in the Maintenance and Management Plan with respect to the technical studies and advice in connection with the Operations, detailed in the DBFO Contract.

5.1.6 BEAR Scotland shall provide any additional information that may be brought to the attention of the Scottish Ministers via HMG, which will be incorporated into the Quality Plan.

6.0 ENVIRONMENTAL MANAGEMENT OF THE OPERATIONS (Schedule 5 Clause 6 & O&M Schedule 5 Clause 6)

6.1 The part of the Quality Plan for the environmental management of the Operations shall include but not be limited to the provision of the following:

6.1.1 Contained within the Maintenance and Management Plan are the names, roles, responsibilities and authority of the key personnel that are employed in the Environmental Management of the Operations including the line of communication links between all parties involved in the delivery of the Operations by BEAR Scotland. Also refer to the organization chart in clause 1.1.9 of this Quality Plan.

6.1.2 The liaison arrangements with the Scottish Ministers personnel associated with the DBFO Contract are detailed in section 3.2 of this Quality Plan.

6.1.3 The Project Quality Director will have access to all DBFO Contract related documents, including records to undertake an evaluation of BEAR Scotland's compliance with respect to the DBFO Contract.

6.1.4 BEAR Scotland shall provide all required documentation to comply with the specified requirements of the DBFO Contract supporting our full UKAS certificated management system to BS EN ISO 14001:2004, including the following;

(a) Environmental Policy;

(b) site specific documentation providing operational control, including emergency preparedness, response and notification methods and controls to be employed for the activities in the delivery of the DBFO Contract through the application of the following documented procedures;

- Environmental Information, Ref: M80DBFO-P05
- Method Statements, various
- Management of Accidents and Incidents, Ref: M80DBFO-P29
- Emergency Response Plan, Ref: M80DBFO-ERPlan

(c) Environmental programme, containing objectives and targets, aspects and impact register, training and communications as detailed in the following procedures;

- Environmental Objectives, Targets and Programme, Ref: Proc-026
- Evaluation of Environmental Aspects and Impacts, Ref: M80DBFO-P031
- Training, Ref: Proc-085



- Management Systems Communications, Ref: Proc-025
- (d) Supporting documentation in relation to operational control and emergency response as detailed in the following procedures;
- COSHH, Ref: Proc-043
 - Asbestos Management, Ref: Proc-046
 - Risk Assessments, Ref: Proc-041
 - Welfare, Ref: Proc-042
- (e) Documentation to provide checking, to fulfill the requirements of monitoring and measurement, evaluation of compliance, corrective action, preventive action, control of records and internal audits as detailed in the following procedures;
- Environmental Monitoring, Ref: Proc-053
 - Preventive Action, Ref: Proc-026
 - Non-conformance Control, Ref: Proc-030
 - Provision of Records and Information, Ref: M80DBFO-P027
 - Management Systems Auditing, Ref: M80DBFO-P028
 - Environmental Screening; M80DBFO-P45
 - Duty of Care for Waste; M80DBFO-P055
- (f) Legal and other requirements register as detailed in procedure Management of Legal and Other Requirements, Ref: Proc-052;
- (g) any other documents that may be required to address any other requirements of BS EN ISO 14001: that is not adequately addressed in other parts of the Quality Plan.

The procurement of all activities in respect of environmental management of the Operations are detailed as follows;

- (a) The arrangement for liaison and meetings with our supply chain and the Scottish Ministers personnel associated with the DBFO Contract is detailed in section 3.2 of this Quality Plan.
- (b) The arrangement for the control of personnel selection, based on competence through the consideration of skill, care, qualification, training and experience is contained within the procedures Recruitment, Ref: Proc-085 and Training, Ref: Proc-090;
- (c) The O&M Project Quality Manager is the person responsible for the initiation, updating, monitoring compliance, adequacy of quality records and document control activities as specified in the DBFO Contract. The CV of the O&M Project Quality Manager is available on request.
- (d) BEAR Scotland will operate a deliverables matrix which is contained in the Maintenance and Management Plan to ensure that DBFO Contract all information and records in respect of the environmental management requirements are fulfilled.



(e) BEAR Scotland shall provide any additional information that may be brought to the attention of HMG and the Scottish Ministers via HMG, which will be incorporated into the Quality Plan.

- 6.2 The arrangements made by BEAR Scotland as regards liaison with the Scottish Ministers via HMG shall be as stipulated in the M80 DBFO Contract Schedule 4
- 6.3 The arrangements made by BEAR Scotland as regards liaison with the auditors shall be as stipulated in the M80 DBFO Contract Schedule 5
- 6.4 All relevant procedures required to maintain our certification for the effective overall management and co-ordination of the project by means of Quality Systems complying with, BS EN ISO 14001:2004 are contained within our Sharepoint intranet (BEARnet). It is the responsibility of the IMS team to maintain the documentation within this system. The key documents are detailed in section 6.1.4.
- 6.5 BEAR Scotland shall submit all necessary documentation to HMG for review and onward transmission to the Scottish Ministers for review and consent. Any significant updates to these documents shall also be communicated to HMG for review and onward transmission to the Scottish Ministers representative for consent. This shall be controlled through our Sharepoint Intranet (BEARnet).

7.0 MANAGEMENT OF THE O&M WORKS **(Schedule 5 Clause 12 & O&M Schedule 5 Clause 7)**

The part of the Quality Plan for the management of the O&M Works shall include but not be limited to:

7.1 Refer to 6.1 and to the Maintenance and Management Plan for the name of the O&M Project Quality Manager. The CV of the O&M Project Quality Manager is available on request.

Refer to the Maintenance and Management Plan for the names, roles, responsibilities and authority of key personnel that are employed in the management of the O&M Works including the line of command and communication links between all parties involved in the delivery of the O&M Works. Also refer to the organization chart in clause 1.1.9 of this Quality Plan.

7.2 Refer to the Maintenance and Management Plan for a description of the management structure proposed to cover each activity listed in the related Schedule and showing responsibilities and chain of command for all operational aspects of the O&M Works.

7.3 Reports will be provided as required by the Agreement, including but not limited to

- Weekly Reports
- Monthly Reports
- Annual Reports
- Winter Service Reports
- Flooding Reports
- Monthly Communications Summary
- Any Ad Hoc Reports required

7.5 All relevant procedures required to maintain our certification for the effective overall management and co-ordination of the project by means of Quality Systems complying

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with, BS EN ISO 9001: BS EN ISO 14001: and OHSAS 18001: are contained within the Sharepoint Intranet (BEARnet). All management system documentation is contained within the Sharepoint system (BEARnet) and is also detailed in the M80DBFO Content Register which lists all the specific and generic documentation for the delivery of this contract. It also indicates their control status and current issue number.

7.6 Refer to the O&M Manual for the identification of the O&M Works work instructions and procedures for all activities.

7.7 Key Performance Indicators which will be measured and reported during the contract period are as follows:

7.8

Item	Description
KPI 1	Permanent Repair of Category 1 Defects within 28 days in accordance with the guidelines of Schedule 4 Part 2
KPI 2	Number of Safety Inspections carried out against the number programmed in accordance with the Contract specification
KPI 3	Number of Safety Patrols carried out against the number programmed in accordance with the Contract specification
KPI 4	Number of Detailed Inspections carried out against the number programmed in accordance with the Contract specification
KPI 5	Lamp outages
KPI 6	Ratio of unplanned treatments carried out to the number of planned treatments – Winter Period Only
KPI 6a	Number of planned treatments carried out
KPI 6b	Number of unplanned treatments carried out
KPI 7	Number of times vehicles commenced treatment within one hour of being called – Winter Period Only
KPI 8	Number of pre-treatments completed within 2 hours – Winter Period Only
KPI 9	Number of pre-treatments completed prior to road surface temperatures reaching +1°C – Winter Period Only
KPI 10	Actual salt usage per treatment – Winter Period Only
KPI 10a	Total salt usage for reporting month – Winter Period Only
KPI 11	Emergency call outs which conform to Contractual timescales
KPI 12	Principle Inspections carried out against the number programmed in accordance with the Contract specification
KPI 13	General Inspections carried out against the number programmed in accordance with the Contract specification

These KPIs are for information only and are reported in the Monthly Report as agreed with the Scottish Ministers.

7.9 Sharepoint Intranet (BEARnet) details all specific and generic procedures and forms for this contract. It includes;

7.9.1 Documentation for the effective management in respect of the O&M Works.

7.9.2 Documentation for the procurement of all activities in respect of the management of the O&M Works including;



- (i) The arrangement for liaison and meetings with our supply chain and HMG and the Scottish Ministers personnel via HMG associated with the DBFO Contract is detailed in section 3.2 of this Quality Plan;
- (ii) The arrangement for the control of personnel selection, based on competence through the consideration of skill, care, qualification, training and experience is contained within procedures Recruitment, Ref: Proc-085 and Training, Ref: Proc-090 to meet the M80DBFO Contract Requirements;
- (iii) The O&M Project Quality Manager is the person responsible for the initiation and updating of the Quality Plan during the Services Period. The procedure for this requirement is Document Control, Ref: M80DBFO-P27. All pertinent documentation shall be submitted to the Scottish Ministers representatives for approval via HMG.
- (iv) The O&M Project Quality Manager is the person responsible for monitoring compliance with the Quality Plan in respect of the Operations through the Management Systems Auditing, Ref: M80DBFO-P28
- (v) The O&M Project Quality Manager is the person responsible for the adequacy of the quality records produced. The procedure for this requirement is Provision of Records and Information, Ref: M80DBFO-P27;
- (vii) The O&M Project Quality Manager is responsible for all document control activities. The procedure for this requirement is Document Control, Ref: M80DBFO-P19;

7.9.3 BEAR Scotland manages the process for replacing Volumetric Traffic Measurement Equipment during Major Maintenance schemes through the application of a specialist subcontractor. Ref: procedure Traffic Counting M80DBFO-P36;

7.9.4 BEAR Scotland manages the requirements for the verification of the outputs from Volumetric Traffic Measurement Equipment through the application of procedure Traffic Counting, Ref: M80DBFO-P36 and associated method statements;

7.9.5 BEAR Scotland manages the requirements of BS EN ISO 14001:2004 through documented procedures encompassing all specified requirements for Environmental Management Systems as detailed in section 6 of this document.

8.0 EXECUTION OF THE O&M WORKS **(Schedule 5 Clause 13 & O&M Schedule 5 Clause 8)**

The part of the Quality Plan for the execution of the O&M Works shall include but not be limited to:

- 8.1 The documentation held in the O&M Manual shall be used to control the activities as listed in Schedule 4 of the M80DBFO Contract and also in Section 1.1 of this Quality Plan. Also refer to the organization chart in clause 1.1.9 of this Quality Plan.
- 8.2 Refer to the DBFO Contract Specific procedures listed in the O&M Manual.
- 8.3 Refer to the Maintenance Management Plan, Section 2 for the names, roles and responsibilities and authority of the key personnel to be employed in the execution of the



O&M Works. This includes the line of command and communication links between all parties involved in the delivery of the management of the O&M Works.

- 8.4 The arrangements made by BEAR Scotland as regards liaison with the Scottish Ministers via HMG shall be as stipulated in the M80DBFO Contract
- 8.5 The arrangements made by BEAR Scotland as regards liaison with the auditors shall be as stipulated in the M80DBFO Schedule 5 Contract.
- 8.6 Sharepoint Intranet lists all the specific and generic documents for this contract.
- 8.6.1 BEAR Scotland shall not undertake any activity without the use of documented Procedures and Plans which shall have been submitted to the Scottish Ministers Representatives for approval.
- 8.6.2 With respect to the procurement and execution of services and works relating to the O&M Works, the following applies;
- The arrangement for liaison and meetings with our supply chain and HMG or the Scottish Ministers personnel via HMG associated with the DBFO Contract is detailed in section 3.2 of this Quality Plan.
 - The arrangement for the control of personnel selection, based on competence through the consideration of skill, care, qualification, training and experience is contained within procedures Recruitment, Ref: Proc-085 and Training, Ref: Proc-090;
 - BEAR Scotland utilise approved supply chain organisations for materials and Constructional Plant, which is contained within the procedure Supply Chain Management and Review, Ref: Proc-013
 - The O&M Project Quality Manager is the person responsible for the initiation, updating, monitoring compliance, adequacy of quality records and document control activities as specified in the DBFO Contract. The CV of the O&M Project Quality Manager is available on request.
 - (a) The O&M Project Quality Manager is also responsible for monitoring compliance with the Quality Plan during the execution of the O&M Works through the Management Systems Auditing, Ref: M80DBFO-P28
 - (b) The O&M Project Quality Manager is responsible for the adequacy of the quality records as detailed in procedure Provision of Records and Information, Ref: M80DBFO-P27
 - (c) The O&M Project Quality Manager is responsible for all document control activities as detailed in procedure M80DBFO-P19



8.7 The following items shall be controlled within the BEAR Scotland Sharepoint Intranet system:

- Quality Plan
- O&M Manual
- The Maintenance Management Plan, including the Asset Management Strategy, Maintenance forward Plan and Annual Maintenance Plan
- Winter Service Plan
- Emergency Response Plan
- The Landscape Development Plan, including the 5 Year Landscape Maintenance Review and Pesticide Reduction Plan
- TRISS Plan
- All Generic and Specific Procedures and Method Statements

**9.0 PAYMENT MECHANISM
(APPLICABLE TO O&M WORKS ONLY, WHICH EXCLUDES MAJOR MAINTENANCE)
(Schedule 6)**

- 9.1 BEAR Scotland recognise the payment mechanism specified in Schedule 6. The Non Conformance Register shall be used to monitor and control all Non Conformances raised, whether it be from 1st, 2nd or 3rd Party audits. This will also include any Non Conformances raised from any other sources. Non Conformances relating to the application of the Quality Plan shall also be dealt with in this manner.
- 9.2 BEAR Scotland shall produce an Internal Audit Programme which covers the full scope of the contract requirements as defined in Schedule 4, Part 1. These audits shall be carried out within a 12 month period. An internal audit procedure is available to control this process. All audit reports shall be held on the Sharepoint Intranet. Where non-conformities are not closed out within agreed timescales, BEAR Scotland will be subject to deductions.
- 9.3 BEAR Scotland shall undertake audits as defined in the audit programme for this DBFO Contract in relation to the requirements for O&M Works Management Activities. The Non Conformance Register shall be sent to the HMG as per the contractual reporting timescales. Monthly reports to the HMG (as defined in the DBFO Contract) shall make reference to all instances of Unavailability
- 9.4 BEAR Scotland shall provide copies of the audit reports and a summary sheet, including the status of all non-conformities to HMG at intervals not exceeding 3 months.
- 9.5 BEAR Scotland recognise that where non-conformities are identified with respect to the application of the Quality Plan requirements relating to O&M Works Management Activities, this shall be subject to deduction as defined in Schedule 6.
- 9.6 BEAR Scotland operates a Lane Unavailability Procedure (Ref: M80DBFO-P02 Lane Unavailability) providing a defined process for compliance with respect to the requirements specified in Schedule 6.

**10.0 MAJOR MAINTENANCE CONSULTANCY
(MAJOR MAINTENANCE AGREEMENT AND SCHEDULE 4 OF THE O&M CONTRACT)**



- 10.1 Major Maintenance shall be managed by the Asset Manager who is responsible for this process. Refer 1.1.9.
- 10.2 Major Maintenance schemes shall be identified using information from the following sources;
 - Pavement Management System (PMS)
 - Routine Maintenance and Management function of IRIS (RMMf) Cat 1 & 2s
 - Structural Maintenance Pavement Surveys
 - Detailed Inspections
 - Ad Hoc Inspections
 - Visual Inspections
- 10.3 BEAR will create rolling 2 year programmes of proposed Major Maintenance for each asset type in the Maintenance Management Plan. These programmes will include:
 - Draft 3 year programme of Major Maintenance
 - Detailed 1 year programme of Major Maintenance (incl Lane Unavailability)
 - Recommendations for further investigation required
 - Outline budget assessments including preliminary estimates in both the 1 year and 3 year programmes
- 10.4 Major Maintenance 1 and 3 year programmes shall be created on a yearly basis with a list of all the potential schemes. These programmes shall be agreed with HMG then submitted to Scottish Ministers Representatives as part of the Maintenance Management Plan by 1st March each year (30 days before the completion of each Contract Year). This is as per Schedule 4 Part 1 Clause 28.1.4.
- 10.5 A monthly review of the 1 year programme will be undertaken and any necessary updates made
- 10.6 The Maintenance Management Plan will be produced detailing the condition of each asset and how they are performing against the criteria in Schedule 2 & 4.
- 10.7 "Gateway reports" shall be produced for the recommended treatment and agreed with HMG for year 1 schemes
- 10.8 Schemes shall be processed as per the Major Maintenance documentation listed in 1.2.3.
- 10.9 BEAR manage the procurement of a subcontractor for the works on behalf of HMG.
- 10.10 BEAR will supervise the subcontractor(s) and certificate the works
- 10.11 The documentation for controlling Major Maintenance shall also be contained with the O&M documentation in the O&M manual as per 1.2.1. The documentation will be held in the Sharepoint Intranet (BEARnet). HMG and the Scottish Ministers Representatives have been given access to the documents required by the contract via a client access page.



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