FacilityOptix
FACILITIES MANAGEMENT

Contractor approval checklist

Two questions: is this a reasonable company, and are they competent for this work? Accreditation answers only the first.

Record what accreditation actually verifies rather than ticking that it exists. Issue the asbestos register before first attendance — it is the single most consequential thing an estate hands a contractor.

CONTRACTOR	TRADE / DISCIPLINE	WORK APPROVED FOR
BUILDINGS COVERED	ASSESSED BY	DATE

COMPANY

Registered name and number

Address

Contact and position

How long trading, and in this discipline

Will any work be sub-let, and to whom?

Out-of-hours contact and response arrangement

INSURANCE

Record the expiry. Whether the cover is adequate is a contractual question this sheet does not answer.

Employers' liability — insurer, number, expiry

Public liability — insurer, number, expiry

Professional indemnity, where required — expiry

Any other cover the contract requires — expiry

Certificates seen and copied on (date)

ACCREDITATION

What it verifies, not that it exists.

Scheme and membership number

Date assessed, and expiry

Scope of the assessment

Anything excluded

COMPETENCE FOR THIS WORK

A general accreditation says nothing about whether the individual attending holds what the work requires.

	EVIDENCED	N/A
Trade registration required for this discipline — held and current	☐	☐
Individuals attending hold the required registration or card	☐	☐
Specialist qualifications for the specific work	☐	☐
Experience of comparable work, with references	☐	☐
Calibration and test equipment records, where relevant	☐	☐
Licence held where the work requires one	☐	☐
	☐	☐

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	EVIDENCED	N/A
	☐	☐
	☐	☐
	☐	☐
	☐	☐

HEALTH AND SAFETY ARRANGEMENTS

	SEEN	GAP	N/A
Written health and safety policy	☐	☐	☐
Access to competent health and safety advice	☐	☐	☐
Risk assessment and method statement arrangements	☐	☐	☐
Training and competence records kept	☐	☐	☐
Accident and incident reporting procedure	☐	☐	☐
Accident history provided	☐	☐	☐
Enforcement action history disclosed	☐	☐	☐
Equipment inspection and maintenance records	☐	☐	☐
	☐	☐	☐
	☐	☐	☐
	☐	☐	☐

BEFORE FIRST ATTENDANCE

	DONE	DATE
RAMS received and accepted for the work	☐	☐
Asbestos register issued for the buildings covered	☐	☐
Site rules and emergency arrangements issued	☐	☐
Induction completed	☐	☐
Permit requirements explained	☐	☐
Key, access and escort arrangements agreed	☐	☐
Added to the approved contractor list	☐	☐
	☐	☐
	☐	☐
	☐	☐

APPROVAL AND REVIEW

Approval decays. Insurance lapses, accreditation expires, the competent individual leaves.

APPROVED BY

DATE

ANYTHING CONDITIONAL, AND BY WHEN

EARLIEST EXPIRY ON FILE

REVIEW DUE

RECORD HELD AT

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