# Define the appointment review

Start with the project and the role. Use the evidence to support a reasoned decision.

This is a printable CDM 2015 evidence review tool for clients and practices, not a certificate, statutory assessment scheme or training course. Adapt the prompts to the work. A completed box does not establish competence.

**Project / site / proposed work**

**Location / client type / project stage**

**Proposed appointee / organisation / named lead**

**Role and regime being reviewed / scope / duration**

**Project complexity / significant risks / design interfaces**

**Control, time and resources needed for the role**

**Reviewer / review date / evidence record reference**

CDM focus: relevant skills, knowledge and experience; organisational capability where the appointee is an organisation. Match the enquiry to the project and risks, rather than collecting a standard bundle without review.

Separate role check: Is a Building Regulations Principal Designer appointment also proposed? Review that competence and scope separately. Record the applicable jurisdiction and any Welsh transitional position; do not assume a CDM appointment covers both.

# Ask for relevant evidence

For each prompt, note the evidence reference and review result on page 3. Tick only when reviewed.

### ☐ Comparable work and actual responsibilities

Which projects are relevant? What did the proposed lead actually coordinate, and how does that experience relate to this work?

### ☐ Design risk decisions

Ask for an example explaining design options, risk elimination or reduction, and significant residual information communicated.

### ☐ PCI and coordination arrangements

How will information gaps, design changes, other designers and Principal Contractor interfaces be coordinated and reviewed?

### ☐ Organisational capability and capacity

What people, time, systems and cover are available? Ask how relevant procedures work in practice, including specialist interfaces.

### ☐ Current learning and knowledge

Discuss relevant CPD, professional experience and its application. A certificate or membership alone does not explain project suitability.

### ☐ Limits, additional expertise and escalation

Identify gaps honestly. Who will provide specialist input, how will it be coordinated and what remains unresolved?

**Additional project-specific questions**

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Keep enquiries proportionate. Reference existing evidence where useful and avoid duplicate paperwork. Check source, relevance and limitations. Use redacted or permitted examples and avoid unnecessary personal or confidential information.

# Evidence and action record

Copy this page for each topic. Keep the references traceable to the appointment review.

**Topic / question / why it matters for this project**

**Evidence source / author / date or revision / reference**

**Relevance / limitations / points checked with the provider**

**Reviewer / date / findings**

**Outstanding question / required action**

**Action owner / required by / decision affected**

**Answer or additional evidence / reference / review result**

**Status / next review trigger**

Suggested status: not reviewed / further information required / reviewed. Explain the finding; these are record statuses, not competence grades. Do not treat an evidence upload as completion of the review.

# Record the decision and revisit

Bring the evidence, unresolved limitations and proposed appointment scope together.

**Project / proposed appointee / role / review reference**

**Conclusion and reasons / evidence supporting the decision**

**Outstanding limitations / action owners / dates / effect on appointment**

**Decision by / date / appointment scope and issue reference**

**Next review date or trigger / changes to scope, team or capacity**

Possible review outcomes include: further information needed; evidence supports the proposed appointment for the defined work; or another arrangement is needed. Explain the reasoning and resolve necessary gaps before proceeding. Seek appropriate competent advice if the evidence cannot be assessed.

## Official guidance and scope

CDM 2015 applies in Great Britain. HSE explains project-relevant competence and organisational capability. Building Regulations duties in England and Wales have a different purpose and competence requirements. Wales introduced Part 2B provisions from 1 July 2026, subject to transitional arrangements.

HSE - Principal Designer competence

HSE - CDM guidance L153 (paragraphs 58-65 and 94-100)

Welsh Government - duties and competence

Read the full guide and linked England / Welsh transitional guidance

Sources checked 29 October 2026. General workflow prompts, not project-specific legal advice or official endorsement. Software supports the record; people retain responsibility for the assessment and appointment.