

Proposal Review Checklist

LEV Design

A practical checklist for Duty Holders reviewing LEV design proposals before placing an order

DHC-001

LEV PROPOSAL REVIEW CHECKLIST

1. SCOPE & UNDERSTANDING

- Project scope clearly defined
- Process and hazards identified
- Existing LEV conditions understood
- Regulatory and standards compliance considered

YES	NO	NOT CLEAR	N/A
☐	☐	☐	☐
☐	☐	☐	☐
☐	☐	☐	☐
☐	☐	☐	☐

2. DESIGN BASIS & PERFORMANCE

- Design basis and assumptions stated
- Performance criteria specified
- Hood selection and positioning justified
- Airflow rates and capture performance defined

YES	NO	NOT CLEAR	N/A
☐	☐	☐	☐
☐	☐	☐	☐
☐	☐	☐	☐
☐	☐	☐	☐

3. SYSTEM DESIGN

- Ductwork layout and sizing provided
- Disctian and extraction equipment specified
- Controls and ancillaries and location defined

YES	NO	NOT CLEAR	N/A
☐	☐	☐	☐
☐	☐	☐	☐
☐	☐	☐	☐
☐	☐	☐	☐



Practical Checklist



For Duty Holders



Review with Confidence



Better Decisions at the Right Stage

Purpose & How to Use the Checklist

This checklist is intended to help Duty Holders compare and review contractor proposals for the design of a new or significantly modified Local Exhaust Ventilation (LEV) system before placing an order, and then review the contractor's developed design before installation begins.

It deliberately does not cover installation acceptance or commissioning report acceptance. Those stages should be controlled using the separate OXYL8 installation and commissioning checklists.

DHC-001 is concerned with two decisions: first, whether the proposed contractor and proposal are suitable for appointment; and second, whether the developed design is sufficiently complete, justified and reviewable to be released for installation.

A “Yes” answer does not, by itself, prove competence, compliance or effective control. A “No” or “Not clear” answer should normally prompt clarification, further evidence or competent professional review before appointment or design release.

Two-stage use:

Part A is completed while comparing quotations/proposals and before appointing the contractor.

Part B is completed after appointment, when the detailed design package is available, but before any installation work is authorised.

Response meanings

Yes	Evidence is present and appears adequate
No	Required evidence is absent or inadequate
Not clear	Clarification or competent review is needed
N/A	Not applicable to this project

Important:

The Duty Holder should not select a contractor solely on price or on possession of certificates.

Competence is the combination of relevant qualifications, knowledge, practical experience, resources, supervision and professional judgement for the particular process and contaminants involved.

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Part A: Contractor competence, capability & proposal review

Purpose of Part A:

Use this section to compare contractors and quotations before appointment.

The proposal should demonstrate not only what is being offered and at what cost, but who will design the system, how that work will be technically led and supervised, how the contractor understands the exposure-control problem, and the basis on which success will later be judged.

A1. Contractor and design-team competence

Question	Yes	No	Not clear	N/A
Does the proposal identify the legal entity that will undertake the work and the named project/design lead?	☐	☐	☐	☐
Are the individual members of the proposed design/technical team identified, together with their roles and responsibilities?	☐	☐	☐	☐
Is evidence provided that personnel undertaking the relevant LEV assessment and design work hold appropriate qualifications - eg BOHS P601, P602 and M200 (or demonstrably equivalent competence) treated as the expected minimum for this project?	☐	☐	☐	☐
Is the proposed technical/team leader suitably senior and experienced, with preference given to a CoC(Control) holder who is listed on the BOHS/PSA Professional Standards Register of LEV Specialists?	☐	☐	☐	☐
Can the contractor demonstrate relevant practical experience with LEV systems of similar process type, contaminant, hazard and complexity?	☐	☐	☐	☐
Are arrangements for supervision of less-experienced designers/engineers clearly described, including who will check calculations, drawings, assumptions and design decisions?	☐	☐	☐	☐
Is responsibility for final technical review and design authorisation clearly assigned to a named competent person?	☐	☐	☐	☐

Question	Yes	No	Not clear	N/A
Can the contractor demonstrate sufficient organisational resources and capacity to deliver the design within the required programme?	☐	☐	☐	☐
Where subcontractors or specialist advisers will be used, have they been identified and are arrangements for controlling and reviewing their work explained?	☐	☐	☐	☐
Can the contractor provide relevant project references, example design documentation or other evidence of comparable previous work if requested?	☐	☐	☐	☐
Is suitable professional indemnity and public liability insurance in place and evidenced where required?	☐	☐	☐	☐

Part A: Contractor competence, capability & proposal review (continued)

A2. Understanding of the brief and proposed control approach

Question	Yes	No	Not clear	N/A
Has the contractor demonstrated that they have visited the site, observed the process, or otherwise obtained sufficient first-hand information to understand the task?	☐	☐	☐	☐
Are the hazardous substances used or generated by the process clearly identified, including relevant forms such as dust, fume, mist, vapour or gas?	☐	☐	☐	☐
Is the process and contaminant-generation mechanism adequately described, including normal, foreseeable and higher-emission operating conditions?	☐	☐	☐	☐
Does the proposal demonstrate an understanding of how workers may be exposed and why LEV is an appropriate part of the control strategy?	☐	☐	☐	☐
Are the Duty Holder's COSHH assessments, Safety Data Sheets and other relevant exposure-control information identified as inputs to the design?	☐	☐	☐	☐
Has available workplace/personal air-monitoring data been requested and reviewed, or is there a need to obtain such data before detailed design addressed?	☐	☐	☐	☐
Where existing exposure data are absent or insufficient, does the proposal identify whether baseline air monitoring should be undertaken to characterise the current exposure/control position?	☐	☐	☐	☐
Is the proposed LEV control concept described sufficiently to show the intended capture/containment approach and the relationship between the hood and the process?	☐	☐	☐	☐

Question	Yes	No	Not clear	N/A
Are any significant assumptions, exclusions, limitations and information still required of or from the Duty Holder clearly stated?	☐	☐	☐	☐
Does the proposal identify relevant foreseeable constraints such as make-up air, space, process access, maintenance, noise, discharge location, DSEAR/fire/explosion issues or interaction with other ventilation?	☐	☐	☐	☐

Part A: Contractor competence, capability & proposal review (continued)

A3. Proposed benchmark and verification strategy

Question	Yes	No	Not clear	N/A
Does the quotation/proposal state the control benchmark or control objective that the design will be intended to achieve?	☐	☐	☐	☐
Is the proposed benchmark justified by reference to the hazardous substance, health risk, WEL or other relevant exposure/control criteria rather than simply adopting a generic value?	☐	☐	☐	☐
Does the proposal explain how the benchmark will be translated into measurable design and commissioning criteria such as containment performance, capture/face velocity, volume flow, pressure or other relevant parameters?	☐	☐	☐	☐
Where more than one contaminant or process condition exists, does the proposal explain which condition drives the benchmark and design duty?	☐	☐	☐	☐
Does the proposal explain how the final design will demonstrate that the selected hood/control approach is capable of achieving the stated benchmark under representative process conditions?	☐	☐	☐	☐
Does the proposed verification/commissioning strategy include qualitative observation of contaminant capture or containment as well as quantitative engineering measurements?	☐	☐	☐	☐
Does the proposal address whether post-installation air monitoring will be appropriate to provide exposure evidence against the stated benchmark/control objective?	☐	☐	☐	☐

Question	Yes	No	Not clear	N/A
Where baseline air-monitoring data are available or proposed, is there a clear intention to use them intelligently in judging the effectiveness of the new control, while recognising normal variability and the need for competent occupational-hygiene interpretation?	☐	☐	☐	☐
Does the proposal state that actual commissioned performance values and acceptable ranges will be recorded so that future TExT has a meaningful benchmark for comparison?	☐	☐	☐	☐

A4. Scope, deliverables and commercial clarity

Question	Yes	No	Not clear	N/A
Is the scope of design work clearly defined, including the processes, sources, hoods and system boundaries included?	☐	☐	☐	☐
Are exclusions and interfaces with other contractors or Duty Holder responsibilities explicit?	☐	☐	☐	☐
Does the proposal state the design deliverables to be provided before installation, including drawings, calculations, equipment selections, performance criteria and technical specifications?	☐	☐	☐	☐
Is a formal design-review/approval stage included before manufacture or installation begins?	☐	☐	☐	☐
Does the proposal identify the commissioning/verification deliverables that will ultimately be required, without treating commissioning as part of this design-acceptance checklist?	☐	☐	☐	☐
Are programme, fees, variations and the basis of any provisional sums sufficiently clear to permit fair comparison between contractors?	☐	☐	☐	☐

Part A: Appointment decision & record

Decision point:

Record the outcome of the proposal review before placing the order.

Any conditions, missing competence evidence, benchmark questions or monitoring requirements should be resolved or explicitly carried forward into the appointment and detailed design stage.

Preferred contractor: _____

Proposal / quotation reference: _____

Quoted value (if recorded here): _____

Technical reviewer: _____ Date: _____

Part A appointment decision

- ☐ Preferred contractor / proposal - proceed to appointment subject to normal commercial approval
- ☐ Potentially acceptable - clarification or additional evidence required before appointment
- ☐ Competent independent technical review required before appointment
- ☐ Do not appoint on the basis of the proposal presently submitted

Actions / clarification required:

Part B: Detailed design acceptance before installation

Purpose of Part B:

Complete this section after the contractor has been appointed and the detailed design package has been produced.

The Duty Holder is now deciding whether the design is sufficiently complete and justified to be released for manufacture/installation.

This is not an installation inspection, and it is not commissioning acceptance.

B1. Design basis, hazard and benchmark

Question	Yes	No	Not clear	N/A
Does the detailed design clearly define the process, operating conditions and contaminant-generation mechanisms on which it is based?	☐	☐	☐	☐
Are the hazardous substances and relevant health risks clearly identified and linked to the control requirements?	☐	☐	☐	☐
Is the selected control benchmark/control objective explicitly stated in the design documentation?	☐	☐	☐	☐
Is the benchmark technically justified and is the rationale traceable to the process, contaminant, exposure risk, WEL or other relevant control criterion?	☐	☐	☐	☐
Where the benchmark has changed from that proposed at quotation stage, is the change explained and approved?	☐	☐	☐	☐
Have available air-monitoring/exposure data been reviewed and does the design explain how, if at all, those data influenced the control strategy or design duty?	☐	☐	☐	☐
Where baseline monitoring was identified as necessary, has it been completed or is there a justified reason why design can proceed without it?	☐	☐	☐	☐

Question	Yes	No	Not clear	N/A
Are assumptions, uncertainties and limitations that could materially affect control performance clearly identified?	☐	☐	☐	☐

B2. Hood and control concept

Question	Yes	No	Not clear	N/A
Is the intended control strategy clearly stated for each source of exposure?	☐	☐	☐	☐
Are hood/enclosure types, dimensions, positions and orientations shown and technically justified?	☐	☐	☐	☐
Does the design explain why the proposed hood geometry and location are appropriate to the contaminant behaviour and process movement?	☐	☐	☐	☐
Have operator position, working method, access and foreseeable misuse or repositioning been considered?	☐	☐	☐	☐
Are required capture, face or containment velocities stated where relevant and justified rather than used as unexplained generic targets?	☐	☐	☐	☐
Are required air volume flow rates stated for each hood/branch and linked to the selected hood geometry and control objective?	☐	☐	☐	☐
Where multiple hoods or operating combinations exist, is concurrency clearly defined and accommodated in the design?	☐	☐	☐	☐

Part B: Detailed design acceptance before installation (continued)

B3. System engineering design

Question	Yes	No	Not clear	N/A
Are duct sizes, routes, branch arrangements and transport velocities defined and supported by calculations appropriate to the contaminant?	☐	☐	☐	☐
Are system pressure losses calculated and is the design duty point clearly established?	☐	☐	☐	☐
Is the selected fan suitable for the required duty, contaminant, operating range and foreseeable system resistance?	☐	☐	☐	☐
Are filtration/air-cleaning arrangements specified and suitable for the contaminant loading and required removal performance?	☐	☐	☐	☐
Are discharge arrangements justified, including location, re-entry risk and any requirement for stack height or discharge velocity?	☐	☐	☐	☐
Where air is proposed to be recirculated, is the additional control justification, filtration integrity and monitoring/alarm strategy adequately addressed?	☐	☐	☐	☐
Are make-up air requirements and the effect of room/building air movement on hood performance considered?	☐	☐	☐	☐
Are noise, vibration, energy use and other significant operational impacts addressed where relevant?	☐	☐	☐	☐
Where relevant, have DSEAR, fire, explosion, hazardous-area, bonding/earthing and other specialist safety requirements been incorporated?	☐	☐	☐	☐

Question	Yes	No	Not clear	N/A
Is there a diversity factor built into this design and if so have the limitations been clearly defined and explained??	☐	☐	☐	☐

B4. Operability, maintenance and future TExT

Question	Yes	No	Not clear	N/A
Is the design compatible with normal operator tasks and does it avoid creating incentives to defeat, move or bypass the control?	☐	☐	☐	☐
Are access requirements for cleaning, filter change, inspection and maintenance adequately designed in?	☐	☐	☐	☐
Are suitable test points and measurement locations included so that commissioning and future TExT can be undertaken reliably?	☐	☐	☐	☐
Are indicators, gauges, alarms and interlocks specified where needed to enable users to recognise loss of control?	☐	☐	☐	☐
Are the intended normal operating settings and any adjustable dampers, VSD settings or control positions identified?	☐	☐	☐	☐
Does the design define what information must ultimately be transferred into user instructions, maintenance information and the LEV logbook?	☐	☐	☐	☐

Part B: Detailed design acceptance before installation (continued)

B5. Verification and post-installation evidence planned at design stage

Question	Yes	No	Not clear	N/A
Are measurable design performance criteria defined before installation begins so commissioning can determine pass/fail against design intent?	☐	☐	☐	☐
Does the planned commissioning include observation of the real process, or a justified representative simulation, under conditions that challenge the control?	☐	☐	☐	☐
Does the plan require qualitative assessment of contaminant capture/containment at each relevant hood before relying on airflow measurements alone?	☐	☐	☐	☐
Are the engineering measurements needed to verify design performance identified, including hood/branch flows, pressures, fan duty and other relevant parameters?	☐	☐	☐	☐
Does the plan explain how actual satisfactory commissioned values and acceptable ranges will become the benchmark for future Thorough Examination and Test?	☐	☐	☐	☐
Has the need for post-installation static or personal air monitoring been considered in relation to the health risk, existing exposure evidence and the stated control benchmark?	☐	☐	☐	☐
Where follow-up air monitoring is proposed, are its purpose, timing, operating conditions and intended comparison with baseline/exposure criteria described sufficiently to make the results meaningful?	☐	☐	☐	☐
Is responsibility for interpreting any air-monitoring results assigned to a person with suitable occupational-hygiene competence?	☐	☐	☐	☐

Question	Yes	No	Not clear	N/A
Are acceptance criteria and the response to a failure to achieve the benchmark/control objective defined before installation proceeds?	☐	☐	☐	☐

B6. Design documentation and independent review

Question	Yes	No	Not clear	N/A
Have sufficiently detailed drawings, calculations, schedules and specifications been issued for review?	☐	☐	☐	☐
Are equipment selections and key manufacturer data consistent with the design calculations and stated performance requirements?	☐	☐	☐	☐
Have departures from the original brief or accepted proposal been clearly identified and justified?	☐	☐	☐	☐
Has the contractor's named technical lead completed and recorded the required design check/review?	☐	☐	☐	☐
For complex, novel or high-risk systems, has the Duty Holder considered whether independent competent design review is warranted before installation?	☐	☐	☐	☐
Are outstanding technical queries, assumptions or interfaces closed out, or formally controlled, before authorising installation?	☐	☐	☐	☐

Part B design-release decision

- ☐ Design accepted for release to manufacture / installation
- ☐ Design accepted subject to stated technical conditions being closed before installation
- ☐ Further contractor design information or calculations required
- ☐ Independent competent technical review required
- ☐ Do not authorise installation at this stage

Actions / clarification required:

Supporting evidence & Duty Holder review record

Documents / evidence received

☐ Contractor proposal / quotation and scope of work	☐ Named design-team list, roles and supervision arrangements
☐ Qualification / competence evidence (including P601, P602, M200 or equivalent, as applicable)	☐ Evidence of CoC(Control) / BOHS-PSA register status where claimed
☐ Relevant project references / examples of comparable work	☐ Professional indemnity / public liability evidence where required
☐ COSHH assessments, Safety Data Sheets and process information	☐ Available pre-existing air-monitoring / exposure data
☐ Baseline air-monitoring report where undertaken	☐ Accepted control benchmark / design-control objective and justification
☐ Detailed design specification and design basis	☐ Design calculations and fan/system duty calculations
☐ Layout, hood and ductwork drawings	☐ Equipment / filtration / discharge specifications
☐ DSEAR / fire / explosion information where relevant	☐ Design check / technical authorisation record
☐ Commissioning and verification plan	☐ Proposed post-installation air-monitoring plan where appropriate

Duty Holder review

System / project reference: _____

Supplier / contractor: _____

Proposal reviewed on: _____ by: _____

Detailed design reviewed on: _____ by: _____

Independent reviewer (if used): _____

Overall design-stage status

- ☐ Contractor appointed and detailed design accepted for installation
- ☐ Accepted subject to documented conditions / close-out actions
- ☐ Not accepted pending corrective design action
- ☐ Referred for competent independent review

Key actions and responsible persons

Action	Responsible person	Target date	Complete

Signature: _____ Date: _____



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