EXPRO National Manual for Projects Management

Volume 11, Chapter 2

Project HSSE Orientation and Training Plan

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1.0 PURPOSE

The purpose of this procedure is to identify the process and responsible parties for developing, delivering, and documenting training of personnel and outline required training subjects.

This procedure applies to the training of personnel at all locations, including contractors, sub-contractor, employees. Courses developed internally shall follow this process. Any external courses should be reviewed against the requirements of the procedure to ensure compliance with the included standards.

2.0 SCOPE

The scope of this procedure applies to all works performed under all Government Construction Contracts executed throughout the Kingdom of Saudi Arabia.

3.0 DEFINITIONS

Definitions	Description
ADDIE	Analysis, Design, Development, Implementation, Evaluation: A generic process used by training developers for building effective training.
ALARP	As Low As Reasonably Practicable
Computer Based Training (CBT)	Self-study training that is delivered to personnel via computer.
Course Catalogue	The listing of available training courses
Course Roster	A tool to capture data on the completion of training
CPR	Cardiopulmonary resuscitation
Craft Assessment	A written examination that evaluates the skill level of craft personnel.
HSSE	Health, Safety, Security, and Environment
Instruction	The delivery of information to enable learning; the process of transferring knowledge and / or skills to learners.
Instructional System Design (ISD)	An orderly process for gathering and analysing collective and individual performance requirements to respond to identified training needs. The application of a systems approach insures that learning programs and the required support materials are continually developed in an effective and efficient manner to match a variety of needs in a rapidly changing environment.
Instructor	An individual who transfers knowledge and / or information to learners in a systematic manner by presenting information, directing structured learning experiences, and managing group discussions and activities.
JHA	Job Hazard Analysis
Learning Management System (LMS)	The system used to track and report completion of training requirements to document compliance with this procedure
Proficiencies	Levels of ability (basic, intermediate, and advanced) in competencies.
Project-Specific Training	Training developed or accessed by the Project to ensure that personnel have the competencies required for Project assignments. Project-specific training includes courses, professional development, on-the-job training and community activities.
SAM	System Approach Model
STARRT	Safety Task Analysis and Risk Reduction Talk
Subject Matter Expert (SME)	An individual who is an expert in a particular area or topic and contributes to content development and reviews.
Training Plan	The Training Plan specifies the training goals for the work site location.

4.0 REFERENCES

- EPM-KS0-MN-000001 Project New Employee HSSE Summary Flyer

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5.0 RESPONSIBILITIES

5.1 Project Manager

The Project Manager for the Project is responsible for ensuring the resources and arrangements are available for the implementation and management of this procedure

5.2 Site Construction Manager

The Site Construction Manager is responsible for the following:

- Ensuring compliance with Construction Training Requirements.
- Approval of Construction Training Plan.
- Allocating sufficient resources to implement, develop, and maintain Health, Safety, Security and Environment HSSE performance throughout the life of the Project.
- Setting expectations for compliance with the training program.
- Ensuring Contractor Project Managers are responsible for implementing this Plan.

5.3 HSSE Manager

The HSSE Manager is responsible for:

- Ensuring compliance with HSSE Training Requirements.
- Approval of HSSE Training Plan.

5.4 Training Manager

The Training Manager is responsible for is responsible for the logistics involved with the implementation of this plan on the Project, maintenance of training material, development of new training material, and maintenance of the training records/database. Other responsibilities include the following:

- Overall responsibility for managing and implementing the training requirements contained in this procedure.
- Auditing Responsible Contractors and Sub-contractor's compliance to the Plan.
- Reporting compliance to the Plan monthly.
- Providing Train-the-Trainer instruction and follow up assessment as applicable in regards to training packages developed by Contractor Training department.
- Participating in reviews of corrective actions to help ascertain where training would help minimize reoccurrence/repetition of non-conformance or an incident.

5.5 Training Coordinator

- Manages logistics of training events.
- Management of class rosters.
- Providing course credit in the LMS.

5.6 Training Administrator

- LMS data entry and reporting.
- Monitors course registration.
- Manages the training calendar.

6.0 TRAINING AND DEVELOPMENT PLAN

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Each Project will develop a Training and Development Plan describing the training and education requirements for the Project. This plan should be based on the Project's natural progression, focusing training efforts where and when needed. This plan should address the development needs for the attendees (e.g. Administrative/Clerical, Engineers/Coordinators, Manual/Non-Manual, etc.). Identify the courses, workshops, instructors, and other similar items necessary to execute this plan.

The standard course offerings may include:

- Project HSSE Orientation/Indoctrination.
- Procedure Specific.
- Hazard Recognition.
- Safety Leadership Workshop.
- System Tools (Self-Assessment Program and Safety Leadership Review).
- Customer Site Specific Requirements.
- Applicable Government and/or, Local Requirements.

Basic elements of a typical natural progression of a Project, HSSE Training Plan, categorized by Project phase, include the following:

6.1 Pre-Mobilization Phase

Preparation of the Project specific training and education plan occurs during the earliest phase of the Project life cycle. The following elements must be considered:

- Budget needs.
- HSSE Training facility and Location.
- Course offerings (e.g. First Aid/ Cardiopulmonary resuscitation CPR, and Blood Borne Pathogens).
- Training Media, equipment.
- Develop/Acquire Presentation Packages.
- Customer Requirements.
- Site Security.
- Preliminary schedules.
- Required attendees and instructors.
- Management approvals (as required).

6.2 Mobilization – Civil Phase

The training schedule is refined, as required, and the education and training programs begin during this phase. The following elements must be considered:

- Project overview training, as necessary.
- Specific training – Project Execution Plan.
- Applicable Procedure training.
- Applicable Hazard Recognition training.
- Site Access/Security.

6.3 Mechanical/Electrical Phase

Education and training effort continues. The following elements must be considered:

- Safety Leadership.
- Environmental Compliance Workshop.
- Procedure Training.
- Applicable Hazard Recognition Training.

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6.4 Commissioning/Startup–Operations

Education and training effort continues. The following elements must be considered:

- Safety Leadership (Subsequent Sessions).
- Team Development and Training.
- Project-specific Hazard Recognition Training.
- Procedure Training, as required.

7.0 COURSE DEVELOPMENT

7.1 Methodology

A defined process of course development will be implemented. One of several different processes or methodologies could be used, including:

- ADDIE – The ADDIE Model generally consists of five stages – Analysis, Design, Development, Implementation, and Evaluation.
- Systems Approach Model (SAM) – The SAM model is a systems approach that consists of three phases, with integrated iterative processes to develop and refine instruction material.

When completed, a course should:

- Have defined learning objectives.
- Align with business needs.
- Ensure consistency in quality, delivery and results.
- Be relevant, scalable, and flexible to meet the needs of a variety of Project or office locations.

7.2 Elements of a Completed Course

Each completed course should consist of the following:

7.2.1 Instructor-led or Virtual Instructor-led courses

- Presentation slide deck.
- Instructor Guide.
- Participant Guide.
- Train the Trainer plan.
- Any other job-aids.

7.2.2 Computer Based or online courses

- Completed course fully functioning within the LMS.
- Any job-aids or material to be used outside of the LMS.

7.3 Course Review

A periodic review of course material should be completed to ensure that the course remains relevant to the operating environment, systems in use, and processes included. The review should be completed with the assistance of a subject matter expert, trained instructor, and a member of the training department.

7.4 Course Delivery

7.4.1 Instructor Certification

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A process will be implemented to ensure that instructors are competent for classroom instruction. This process also ensures that every attendee receives a quality learning experience, regardless of location.

This process should include:

- Completion of the relevant course.
- Instruction in proper course facilitation and instruction techniques.
- Completion of a Train-the-Trainer course covering the critical learning objectives.
- Co-instruct the course with a qualified instructor.
- Instruct the course and be observed by a qualified instructor.

The following should be considered when identifying instructors:

- Expertise in subject matter.
- Interest in course instruction.
- Prior experience in course instruction.
- Communication and leadership skills.

7.4.2 Training Plans

7.4.2.1 Construction

Each Project will develop a Construction Training Plan describing the training and education requirements for the Project. This plan should be based on the Project's natural progressions, focusing training efforts where and when needed (tied to the different Stages of the Project) and includes, but is not limited to:

- Manufacturer.
- Supplier.
- Site-based.
- Quality and any other training requirements contained in this procedure.

This plan should address the development needs for the attendees (e.g. Administrative, Clerical, Engineers, Coordinators, Craft, Non-Manual, etc.).

7.4.2.2 Health, Safety, Security and Environmental

Each Project will develop a HSSE Training Plan describing the training and education requirements for the Project. This plan should be based on the Project's natural progressions, focusing training efforts where and when needed (tied also to the different Stages of the Project and includes, all training requirements contained in Section 9.0 of this procedure as a minimum.

7.4.2.3 Professional and Leadership Skills

The Project will develop a Professional and Leadership Skills Training Plan describing the training and education requirements for the Project. This plan should be based on the Project's natural progressions, focusing training efforts where and when needed and includes, but is not limited to:

- Communication skills,
- Supervisory skills,
- General leadership and any other training requirements contained in this procedure.

This plan should address the development needs for the different types of attendees.

7.4.3 Course Register

For each course that is delivered, a course register will be collected. The register should contain the following elements:

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- Course name or title.
- Course date and time.
- Location.
- Attendee name.
- Attendee signature.
- Unique identifier, such as email address or employee ID number.

Additional elements can be added to support administration of the training program.

Once a course is completed, the Course Register will be entered into the LMS to track compliance with the training requirements and be maintained according to the Project record retention requirements.

8.0 ASSESSMENT/EVALUATION

Where the Supervisor (with feedback from the worker's Buddy or other employee) and the HSSE Manager recommends, a new employee requires further training, the employee may be selected for additional training, prior to continued employment in the workplace.

The areas needing improvement should be repeated. An evaluation can be done one (1) week later.

8.1 Learning Management System

The Learning Management System (LMS) is the system used to track course completions and progress in the completion of assigned training requirements. A system will be in use at all locations to monitor progress and provide reporting as indicated in the procedure or as required by management. An ideal system would allow for tracking across multiple Project locations within a given entity and to also be the repository of course material.

8.2 Course Evaluation

To assist in maintaining the quality of delivered courses, evaluations shall be conducted. The Kirkpatrick Model of Learning Evaluation is most prominently used in professional training organizations. The model utilizes four levels to address the behaviour changes that occur as a result of the training. They consist of the following:

Level 1: Reaction – a Participant's reaction to the course.

- A standard post-event evaluation used to capture participant's reaction to the course with flexibility to add custom questions to address course-specific learning objectives. An example of a Level 1 evaluation can be seen as Attachment 7.

Level 2: Learning – a Participant's resulting increase in knowledge, skills, and / or attitudes as a result of the course.

- A standard pre-test and post-test assessment used to analyse the resulting increase in knowledge, skills, and / or attitudes as a result of the course.

Level 3: Behavior – Participant transfer of knowledge, skills, and / or attitudes to the job

- A standard 60-day follow-up evaluation for select instructor-led courses with flexibility to add custom questions to address course-specific learning objectives. A sample Level 3 evaluation can be seen as Attachment 8.

Level 4: Results – Business results attributed to completion of a course

- A comparison of business performance before and after delivery of the training course. Specific measures of performance should be identified and tracked both before and after delivery. Efforts should be made to identify and isolate influencing factors.

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A Level 1 evaluation should be conducted for each course delivered. For courses where learning or behaviour change are critical, Level 2 and 3 evaluations should also be conducted.

Results of course evaluations should be analysed regularly to improve course and instructor performance.

The evaluations should be conducted or input into the LMS to simplify data collection and analysis. It may be beneficial for this analysist to be more frequent to assist in skills development for instructors or to optimize course content and material.

9.0 SUPERVISORS' HSSE ORIENTATION

Each supervisor, regardless of level in the organization, will receive Supervisors' HSSE Orientation training upon promotion, hire, or transfer.

This orientation will outline the duties and responsibilities of the supervisor with regard to HSSE, and provide guidance on how to handle violations of the Job Site work rules.

Supervisors' HSSE Orientation and training will be conducted by the HSSE Manager, Supervisor or designee.

The Site Manager will participate in each Supervisor HSSE Orientation by opening or closing with a statement championing the HSSE process and expressing the expectations.

Items discussed at the Supervisors' HSSE Orientation training may include (as a minimum):

- "Zero Accident" philosophy.
- New employee orientation process.
- Supervisor safety meetings.
- Employee safety meetings.
- Emergency procedures.
- First aid and medical treatment process.
- Incident reporting and investigations.
- Safe work practices/areas.
- Identification badges, Timekeeping, and Security.
- Procedure familiarization.
- Safe work assignments.
- Risk Assessment/Analysis.
- Safety Task Assignment Risk Reduction Talk (i.e., STARRT) and Job Hazard Analysis (JHA).
- Fire prevention and protection.
- Safety Performance and recognition.
- Consequences for Violating Job Site work rules.
- Violence, Drugs in the workplace.
- Quality Assurance Awareness.
- Special Safety/Health requirements/procedures.

A Supervisor's HSSE Orientation Checklist shall be used to ensure that each supervisor receives the required HSSE information.

A sample Supervisor's HSSE Orientation Checklist is provided as Attachment 1.

10.0 BASIC NEW EMPLOYEE ORIENTATION SESSION

All Project manual and non-manual employees, whether newly hired or rehired, will receive, at a minimum, a Basic New Employee HSSE Orientation.

The Basic New Employee HSSE Orientation is intended to be a formal session that provides an understanding of HSSE, and Special Job Site requirements. It is designed to:

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- Provide the employee the knowledge, and information necessary to identify the hazards in their work environment, and to apply the preventive measures, and techniques taught to eliminate or reduce the exposure to illness and injury.
- Promote the Zero Accident Philosophy by introducing all employees to this concept, and how it can be achieved on the Project.

A representative of the Project HSSE Department will conduct the Basic New Employee HSSE Orientation.

It is recommended that the Site Manager participate in each new hire orientation by beginning or closing it with a statement championing the HSSE process and expressing the expectations.

The EPM-KS0-MN-000001 Project New Employee HSSE Summary Flyer will be issued to all new employees and thoroughly discussed. Where applicable, the flyer shall be translated into the appropriate language(s) used by the workforce.

Each employee will complete an acknowledgement page at the end of the training. This acknowledgement page must be kept on file.

The Basic New Employee HSSE Orientation will provide a standardized level of awareness training to the new employee. Typical topics discussed at the Basic New Employee HSSE Orientation may include:

- Management commitment
- Safe behavior overview
- General Project/facility rules
- Emergency procedures
- Personal protective equipment
- Hazard communication
- Housekeeping
- Fire prevention and protection
- Safety, Toolbox meetings
- Fall protection/prevention
- Barricades
- Incident investigation
- Injury/illness reporting
- STARRT/JHA
- Lock-out and tag-out
- Confined spaces
- Compressed gas cylinders
- Back injury prevention
- Hazard awareness
- Excavations and trenching
- Industrial Relations
- Hand power tool safety

Where applicable, all training shall be provided in the language spoken by the workforce, and a test (oral or written) given to measure retention. Multi-lingual training material and a feedback mechanism shall also be developed to ensure that the training provided is fully understood by the workforce.

After this basic orientation, the supervisor will meet with the new employee and discuss the items listed in the “New Employee HSSE Education and Development Checklist - Week No. 1” (Attachment 3). The supervisor will complete this form and return it to the Training Department.

The supervisor is responsible for ensuring that all employees reporting to him receive the basic New employee HSSE Orientation. If the new employee is assigned to the work area prior to the Basic New Employee HSSE Orientation, the Supervisor must contact the HSSE Supervisor, to arrange for a condensed version of the Orientation. The employee is then scheduled to attend the next scheduled Orientation.

For work with potential hazardous exposure, orientation will be completed *before* employees are involved in potentially hazardous exposure activities.

The Training Manager will develop a process to verify the training has been understood. Verification can be done either orally or in writing, but must be documented and kept on file.

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11.0 NEW EMPLOYEE CONTINUING HSSE EDUCATION AND DEVELOPMENT (WEEKS 1-4)

The continuing education and development of new employees is designed to provide them with the knowledge and information necessary to perform their work in keeping with HSSE requirements. It also reinforces comprehension and retention regarding HSSE practices and procedures through the use of multiple contact sessions.

Continuing education shall be used where the Project incorporates specific high-risk tasks such as in the nuclear or chemical/refinery industry.

Attachments 3 - 6 provide checklists to be used during continuing education and development process.

11.1 Buddy System

At any time during the orientation process, the supervisor may assign the new employee to work directly with a veteran employee to facilitate the transition into the workplace.

This provides the new employee with an opportunity to validate his or her progress, and an atmosphere to build constructive working relationships.

12.0 VISITORS & VENDORS

All visitors and vendors must comply with applicable site rules and regulation concerning HSSE. Visitors and vendors who are to be on site for more than 5 days will be required to attend a full orientation.

Alternatively, those who are on site from one to five days will be required to attend a basic visitor's orientation (Attachment 2).

13.0 SPECIALIST TRAINING

Many employees at the Project or facility may require special training and certification where necessary, above the Project orientation. Special training shall include in all sub-headings listed below, the Hazards associated with each one, and controls that can be implemented to reduce the risk as low as reasonably practicable (ALARP). Special Training may include:

- Safety Leader Workshop
- Process Safety Management
- Respirator protection
- Work in confined spaces
- Safe work observation
- Traffic control
- Safety/Fire watch
- Scaffold Operations (erection/dismantling) Users
- Program Hazardous Waste Site S&H Training
- Cranes & Material Handling
- Excavations and trenching
- Suspended personnel platforms
- Articulating boom platforms
- Forklift operation
- Non-destructive Testing
- Powder-actuated tools
- Rigging Methods
- Steel Erection
- Radiological Hazards
- Hazard Awareness Training

14.0 CONSTRUCTION SITE TRAINING DOCUMENTATION

- The Training Coordinator prepares and distributes reports on site construction training including metrics on progress towards achieving the Construction Site Training Plan.
- The Site Manager evaluates achievement of the site construction training goals and achievement of the Construction Site Training Plan.

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15.0 RE-TRAINING

Retraining shall be provided where appropriate on Project.

16.0 JUST-IN-TIME TRAINING

The concept of “Just in Time” Training is to provide specific training relating to specific activities prior to a specific task or scope of work being performed, emphasis is placed on tasks with significant risk as identified within the Specialist Training section above.

17.0 TRAINING ASSESSMENT

The HSSE Supervisor, the Site Manager, HSSE Manager, and other on site management will monitor training performed on Project.

18.0 SAFETY/TOOLBOX MEETINGS

As a means of providing continued training on specific topics or issues of concern, all Contractors manual and non-manual employees shall attend at least one safety meeting per week. The topic to be discussed can be from the “Safely Speaking” topics issued to all Projects. Safety meetings shall be recorded and records retained on file. Safety meetings shall also be monitored by on site management.

19.0 ATTACHMENTS

1. EPM-KS0-TP-000004 - Supervisors Orientation Checklist
2. EPM-KS0-TP-000005 - Visitor Orientation Checklist
3. EPM-KS0-TP-000006 - New Employee Education and Development Checklist (Week 1)
4. EPM-KS0-TP-000007 - New Employee Education and Development Checklist (Week 2)
5. EPM-KS0-TP-000008 - New Employee Education and Development Checklist (Week 3)
6. EPM-KS0-TP-000009 - New Employee Education and Development Checklist (Week 4)
7. EPM-KS0-TP-000010 - Level 1 Evaluation Sample Form Template
8. EPM-KS0-TP-000011 - Level 3 Evaluation Sample Form Template

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Attachment 1 - EPM-KS0-TP-000004 - Supervisors Orientation Checklist

SUPERVISOR'S NAME: _____ DATE: _____

ORIENTATION CONDUCTED BY: _____

Upon completion of this checklist, the supervisor and safety department representative shall sign their names in the designated space indicating that the following information was reviewed during a supervisor orientation session.

☐	**SAFETY & HEALTH STANDARDS** The safety and health Standards of the Owner are integrated within the HSSE Execution Plan. It is the supervisor's responsibility to ensure that these standards, as they apply to the work under his/her direction, are properly considered. It is important that supervisors have a general knowledge of these standards in order to plan their work activities.	☐	**SUPERVISOR SAFETY MEETINGS** Supervisor safety meetings are conducted weekly. Attendance of these meeting is mandatory and attendance records shall be kept on file. During these meetings, the safety information relative to employee safety meetings must be reviewed. These meetings are conducted by the CSM/FM, or designee, and the HSSE representative.
☐	**SAFETY POLICY** The safety policy revolves around the premise that all accidents, unusual events, and injuries are preventable. Each supervisor shall apply this principle during the course of his/her work.	☐	**EMERGENCY PROCEDURES** Each supervisor must be familiar with the emergency procedures developed so that they may provide the leadership required to cope with serious injuries, fires, evacuations, and other such circumstances or emergencies.
☐	**GENERAL SAFETY & HEALTH RESPONSIBILITIES** The first-line supervisor has a key role in the administration and execution of the systems of the safety and health process. It is the responsibility of each supervisor to plan safety into his/her work activities each day to ensure that all steps are taken to provide employees with the knowledge and work environment to perform activities without incident or injury.	☐	**INCIDENT INVESTIGATIONS** Supervisors are required to participate actively in the investigation of any accident that results in: 1. Personal injury to an employee under their supervision. 2. Equipment or property damage in their area of responsibility. 3. Near miss incidents. Supervisor/management and other representatives, as required, will investigate major incidents jointly.
☐	**DISCIPLINARY ACTIONS** The first-line supervisor is responsible for correcting unsafe acts and conditions. This includes taking disciplinary actions with employees as necessary.	☐	**FIRST-AID AND MEDICAL SERVICES** Supervisors shall ensure that all employees are aware of their obligations to immediately report all injuries, however minor, to their supervisor and first-aid representative.
☐	**ZERO ACCIDENTS** The "Zero Accidents Philosophy" means that all accidents/injuries are preventable and that Contractor is committed to achieving and sustaining "Zero Accident Performance" through continuous improvement practices.	☐	**FIRE PROTECTION AND PREVENTION** Supervisors are expected to maintain a constant awareness of the fire potential in their area of responsibility. If a potential fire hazard is noted, the supervisor shall initiate corrective action and report the incident to their supervisor.
☐	**SAFETY IN THE WORK PLACE** Each supervisor is expected to be familiar with the working conditions within his/her area of responsibility. Supervisors are charged with communicating deficiencies and issues of non-conformance to their immediate supervisor. In situations where an accident or injury is imminent because of an action or condition, the supervisor has the authority to cease work activities regardless of where the incidence occurs.	☐	**EMPLOYEE SAFETY MEETINGS** Supervisors must conduct daily safety meetings with the employees under their supervision. These meetings must include information regarding work plans, potentially hazardous operations, accident prevention methods, accident statistics, and other such accident prevention techniques. These meetings should promote a positive attitude and provide an opportunity for open discussion with employees.
☐	**SAFE WORK PRACTICES** When making work assignments, the supervisor must include instructions regarding safe practices, work methods, and use of personal protective equipment. The supervisor is responsible for ensuring employees have the proper personal protective equipment and employees under their supervision utilize suitable tools.	☐	**SAFETY MEETING QUALITY SURVEY** Various members of Contractor management team will attend the daily employee safety meetings as observers. The objective of the observation is to ensure that matters concerning safety and health are communicated effectively to employees.
☐	**JOB HAZARD ANALYSIS** Supervisors are responsible for participating in the JHA process.	☐	**OWNER FACILITIES** Supervisors must be familiar with the Owner's Safety, Health and Environmental Standards that apply to the scope of work being performed.
☐	**OTHER:**		
	Supervisor Signature		Safety Representative Signature

SAMPLE

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Attachment 2 - EPM-KS0-TP-000005 - Visitor Orientation Checklist

PROJECT NAME: _____ DATE: _____

PURPOSE OF VISIT: _____

VISITOR NAME(S): _____ _____

_____ _____

_____ _____

_____ _____

SAMPLE

☐	**EMERGENCY PROCEDURES** Emergency Phone Number: _____ Evacuation Assembly Point: _____
☐	**PERSONAL PROTECTIVE EQUIPMENT (PPE) REQUIREMENTS** ☐ Hard Hat ☐ Safety Glasses (with side shields) ☐ Protective Clothing Requirements ☐ Hearing Protection Requirements (Posted Areas) ☐ Appropriate Footwear
☐	**VISITOR RESPONSIBILITIES** • Report to host any unsafe condition or activity observed • Report to host injury or adverse health effects experienced • Comply with all posted signs, tags, and barricades • Comply with all requirements, including smoking restrictions
☐	**VISITOR RESTRICTIONS** Visitors are not permitted to: • Perform work without authorization • Tour unescorted • Remove any property from premises without authorization • Bring cameras, video production and other photographic equipment without prior authorization

ORIENTATION CONDUCTED BY:	
_____ Printed Name / Department	_____ Signature

VISITOR SIGNATURES:

_____ _____

_____ _____

_____ _____

_____ _____

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Attachment 3 - EPM-KS0-TP-000006 - New Employee Education and Development Checklist (Week 1)

EMPLOYEE NAME: _____ DATE: _____

EMPLOYEE/BADGE NO.: _____ SUPERVISOR: _____

This form is to be completed by the first-line supervisor with the employee during the employee's first week of employment. Upon completion of the orientation session, initial the form in the designated areas indicating the information was reviewed to the satisfaction of the employee and supervisor. Return to the HSSE Department upon completion.

☐ **FIRE & EMERGENCY RESPONSE REQUIREMENTS** Explain location of fire alarms and what to do in the event of fire or another emergency. Cover the following: • How to identify a fire or emergency alarm • Shutting down work (welding, electrical, tools) • Evacuation of area • Location of designated assembly areas • Identification of assembly point coordinators Point out the location of fire extinguishers, fires hoses and other fire-fighting equipment. Explain their intended purpose. Explain the following: • Maintaining access to fire-fighting equipment • Reporting fires and other emergencies • Where to return empty fire extinguisher Show employee where to locate emergency telephone numbers and how to use the emergency system.	☐ **HOUSEKEEPING BASICS** Review the importance of good housekeeping and what is expected of each employee during the work day. Explain: • Maintaining a clean work environment • Clean up at the end of each work day • Clean up when a work assignment is complete • Proper disposal of trash and unused materials
☐ **FACILITIES INFORMATION/REQUIREMENTS** Cover the location and use of restrooms and wash facilities. Explain: • The smoking/open flame restrictions • Use of Owner facilities • Review the use of lunchroom and canteen facilities. Point out where the facilities are located.	☐ **INCIDENT REPORT REQUIREMENTS** Stress the necessity of reporting near miss incidents, accidents and/or injuries when they occur. Emphasize that early reporting and early treatment will help to reduce the severity of an injury. Explain that failure to report an injury when it occurs may jeopardize workers' compensation benefits. Explain that reporting all incidents is a key to developing and implementing methods to prevent reoccurrence. Emphasize that there will be NO retaliation measures taken against any employee who reports a work-related injury/illness in accordance with injury/illness procedures. Discuss the Near Miss Incident Report
☐ **TOOLS AND EQUIPMENT (If Applicable)** Define the use of tools and indicate where the tool room facilities are located. Review the following: • How to obtain tools from the tool room • System for repairing tools • Use of tools in restricted areas • Removal of tool guards and safety devices • Use of tools for their intended purpose • Color code system and reporting defective tools	☐ **MEDICAL AUTHORIZATION REQUIREMENTS** Explain how to obtain authorization to seek medical treatment for work-related injuries. Show employee where to report for medical treatment and how to get emergency assistance or help immediately.
☐ **HSSE: ESSENTIAL INFORMATION** Review the following: Location of the safety office and services provided by the HSSE Department • How to obtain protective clothing and its proper use • How to obtain respiratory equipment and its proper use • Requirements regarding the use of personal protective equipment (PPE) including safety glasses, fall protection equipment, protective footwear, special protective clothing, hearing protection, gloves, hard hats, face shields, goggles, and welding/cutting equipment • Cautions regarding long hair, beards, and jewelry around operating machinery • Review the smoking policy	☐ **OTHER:** Name of Buddy/Veteran: The following is a summary of the information discussed during the meeting with employee:

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SUPERVISOR REVIEW

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Attachment 4 - EPM-KS0-TP-000007 - New Employee Education and Development Checklist (Week 2)

EMPLOYEE NAME: _____ DATE: _____

EMPLOYEE/BADGE NO.: _____ SUPERVISOR: _____

This form is to be completed by the first-line supervisor during the employee's second week of employment. Upon completion of the session, initial in appropriate space provided and return to the HSSE Department.

☐ **COMPRESSED GASES CYLINDERS**

Show employee where compressed gas cylinders are stored and the proper use of safety chains to secure gas cylinders in the upright position. Cover the following:

- Proper separation of fuel gas and oxidizing cylinders
- Replacement of cylinder caps when not in use, stored, or transported
- Reporting defective cylinders to the tool room personnel and the supervisor
- Proper use, transport and storage of cylinders in the upright position. Cylinders must be transported in handcarts designed to ensure cylinders remain in an upright position
- Removal of cutting torches and gauge assemblies from cylinders when not in use and at the end of the work day
- Frequent inspection of hoses, gauges, and bottles for defects
- Removal of any dirt or foreign material in cylinder valves by cracking the valve open to remove such material. Ensure that valve, hoses connections, and other parts of the systems are not contaminated with oil or other petroleum based materials.

☐ **USE OF TOOLS AND EQUIPMENT**

Ensure that employee understands what special training and licenses are required for the use or operation of tools, equipment and machinery. Vehicles such as trucks are not to be operated without proper licenses.

Explain the importance of properly using and maintaining company-supplied equipment and tools. Emphasize the importance of reporting damaged or defective tools and equipment.

Discuss methods to avoid hand injuries and provide examples of pinch points and other "hand traps."

Define the use of tools and indicate where the tool room facilities are located. Review the following:

- How to obtain tools from the tool crib
- System for repairing tools
- Use of tools in restricted areas
- Removal of tool guards and safety devices
- Use of tools for their intended purpose
- Color code system and reporting defective tools

☐ **FIRE PREVENTION & PROTECTION**

Review the importance of using welding shields, fire blankets, and other fire prevention systems during grinding, welding, and cutting operations.

Ensure employee understands that special permits are required to perform work which generates sparks or open flames. Explain the mandatory use of a fire watch while performing such operations.

☐ **ELECTRICAL TOOLS & EQUIPMENT**

Review the proper use of electrical tools and the importance of not removing guards or rendering other safety features inoperative. Explain the procedure for:

- Disconnecting electrical tools from their power source when not in use
- Hanging electrical cords and temporary electrical systems at least seven feet above the floor on insulated hangers designed for this purpose
- Explain how to perform a pre-operational inspection on motorized and electrical equipment prior to their use. (Include gas-powered tools in this discussion, if applicable).

☐ **MATERIAL HANDLING REQUIREMENTS**

Define the methods to use for securing loads on trucks, wagons, forklifts, and other equipment used to transport materials. Include in the discussion:

- Methods for transporting pipe and other supplies ten feet or more in length
- Forklifts are not allowed to be used to transport pipe, metal or other materials which are longer than ten feet (10') on streets
- Forklifts must have a flashing light in operation while inside buildings or other enclosures; or one employee must be in front of and to the rear of the forklift while in operation inside buildings or enclosures.
- Explain the proper method of moving cranes from location to location.

Explain the proper use of JLG's, scissors lifts, man-lifts, and man-baskets. Include the following:

- Lifting equipment shall not be used as an elevator. Employees may not ascend or descend on a piece of lifting equipment and exit onto a work level.
- The controls of lifting equipment shall not be abandoned while the equipment is in use.
- Equipment operators must be qualified authorizing them to operate lifting equipment.

☐ **OTHER:**

Name of Buddy/Veteran:

The following is a summary of the information discussed during the meeting with employee:

SAMPLE

SUPERVISOR REVIEW

REVIEWED BY: _____ DATE: _____

EMPLOYEE INITIALS: _____ SAFETY DEPT. INITIALS. _____

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Attachment 5 - EPM-KS0-TP-000008 - New Employee Education and Development Checklist (Week 3)

EMPLOYEE NAME: _____ DATE: _____

EMPLOYEE/BADGE NO.: _____ SUPERVISOR: _____

This form is to be completed by the first line supervisor during the employee's third week of employment. Upon completion of the session, initial in appropriate space provided and return to the Safety Department.

☐	Inform employee of where electrical disconnects are located for machinery. Indicate the importance of maintaining a clear access to electrical equipment. Ensure employee is aware of how to report electrical equipment problems.	☐	Caution employee not to perform work if they feel they have not been given sufficient instruction or training. Explain how to receive additional instructions if they do not understand the proper procedures or methods to perform their work. All work must be performed in a safe manner.
☐	Review the importance of obeying project/facility speed limits and traffic signs.	☐	Explain what is expected of employees and the actions that may take place if they fail to follow instructions.
☐	Show employee where the Hazardous Communication Program, Chemical Protection System, and MSDSs are located. If applicable.	☐	Generally, review purpose of following all safety rules, regulations, and procedures, and stress that the safety of employees is of prime importance.
☐	Review the importance of properly storing chemicals and the hazards involved with storing flammable materials and aerosol cans on or near welding operations.	☐	Define the rules regarding entry into production areas or other unauthorized areas.
☐	Explain potentially hazardous conditions and chemicals in the employees assigned work areas.	☐	**OTHER:** Name of Buddy/Veteran:
☐	Discuss the value of keeping work area clear of unsafe equipment or materials.		
☐	Review in detail the importance of locking out equipment and other energy systems prior to starting any work. Emphasize that only Owner personnel can operate permanent plant valves, switches and other plant equipment.		
☐	Explain the principles and purpose of the "Open Door Policy."	The following is a summary of the information discussed during the meeting with employee:	
☐	Stress the need for continuous teamwork with all employees.		
☐	Ask employees if they have any questions or concerns prior to going to work.		

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REVIEWED BY: _____ DATE: _____

EMPLOYEE INITIALS: _____ SAFETY DEPT. INITIALS. _____

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Attachment 6 - EPM-KS0-TP-000009 - New Employee Education and Development Checklist (Week 4)

EMPLOYEE NAME: _____ DATE: _____

EMPLOYEE/BADGE NO.: _____ SUPERVISOR: _____

This form is to be completed by the first line supervisor during the fourth week of employment. Upon completion of the session, initial in appropriate space provided and return to the HSSE Department.

☐ **SCAFFOLD REQUIREMENTS** Explain the scaffolding procedures and the scaffold tagging system. Include: • Working on defective or incomplete scaffolds • Modification of systems by authorized personnel	☐ **EYE PROTECTION** Review the requirements regarding eye protection. • Emphasize that industrial grade (ANSI Z-87 or equivalent) safety glasses are required always, even while performing welding operations. • Explain that certain tasks require additional eye protection. While using a side grinder, use of face shield and safety glasses is mandatory.
☐ **BARRICADE REQUIREMENTS** Review the barricades and barricade tape procedures. Explain the meaning of: • Yellow and Black – Caution • Red and Black – Danger • Red "Danger" - No entry into areas so marked	☐ **BASICS OF BACK INJURY PREVENTION** Explain the basic elements of the Contractor Back Injury Prevention Program, including: • Using proper lifting techniques when lifting materials by hand. • The importance of obtaining additional help to lift heavy or awkward loads. • Contractor's continued and frequent emphasis on back injury prevention (e.g., through Tool Box Talks, Safety Meetings, Newsletters, etc.) • Use of the morning stretching exercises.
☐ **HAZARDOUS WORK PERMITS** Define when and where entry and work permits are required. Explain: • The definition of a "confined space." • Conditions defined as "hot work." • Reasons for Excavation/Trenching permits	☐ **OTHER:**
☐ **USE OF FALL PROTECTION** Explain how to inspect safety harness and lanyards prior to use, how lanyards should be tied off to a substantial object located overhead, and correct use of the D-ring.	
☐ **USE OF LADDERS & SCAFFOLDS** Review the general use of ladders. • Explain that ladders are color coded to show when they were inspected. • Only ladders with a current inspection shall be used. • Emphasize that all ladders must be secured always when in use. They may be secured by tying them off with a safety rope, by someone holding them while in use, or they may be secured with safe-t-legs if so equipped. • No one can work at any level above the second step from the top of a ladder. • Stepladders shall not be used in a folded position as a straight ladder. • The use of tables, chairs, cement blocks, wire reels, etc., as ladders is strictly prohibited.	The following is a summary of the information discussed during the meeting with employee:

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SUPERVISOR REVIEW

REVIEWED BY: _____ DATE: _____

EMPLOYEE INITIALS: _____ SAFETY DEPT. INITIALS. _____

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Attachment 7 - EPM-KS0-TP-000010 - Level 1 Evaluation Sample Form Template

Please circle the appropriate response after each statement. Your input will help us evaluate this workshop and improve future ones. Thanks for your candid feedback.

Evaluation	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Overall Satisfaction					
1. I was satisfied with this course.	1	2	3	4	5
2. I will recommend this course to my colleagues	1	2	3	4	5
Valuable Use of Time					
3. The session was a valuable use of my time.	1	2	3	4	5
Job Impact					
4. I will apply what I learned on the job.	1	2	3	4	5
Learning Effectiveness					
5. I learned new knowledge and / or skills.	1	2	3	4	5
Supervisor Engagement					
6. Prior to attending, my supervisor and I discussed how this course fits into my development plan.	1	2	3	4	5
Courseware					
7. I found the course materials easy to navigate.	1	2	3	4	5
8. I felt that the course materials (e.g. slides, handouts, etc.) will be essential for my success.	1	2	3	4	5
Environment					
9. I was pleased with the classroom facility.	1	2	3	4	5
Instructor(s)					
10. I was well engaged by the facilitator throughout the course	1	2	3	4	5
11. My learning was enhanced by the facilitator's knowledge of the subject matter	1	2	3	4	5
Objectives					
12. I understood the learning objectives.	1	2	3	4	5
13. The course satisfied the stated learning objectives	1	2	3	4	5
Open Ended Questions:					
14. What were 1-2 things you found most useful in the course (please be as specific and detailed as possible)?					
15. What were 1-2 things you found least useful in the course (please be as specific as possible)?					
16. Do you have any other recommendations to improve the course (i.e. course duration, delivery, technology challenges, content revisions, etc.)?					

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Attachment 8 - EPM-KS0-TP-000011 - Level 3 Evaluation Sample Form Template

Please circle the appropriate response after each statement. Your input will help us evaluate this workshop and improve future ones. Thanks for your candid feedback.

Evaluation	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Overall Satisfaction					
1. I was satisfied with this course.	1	2	3	4	5
2. I have recommended this course to my colleagues.	1	2	3	4	5
Valuable Use of Time					
3. This course was a valuable use of my time.	1	2	3	4	5
Job Impact					
4. I have applied what I learned in this course on the job.	1	2	3	4	5
5. Please provide 1-2 specific examples and describe their impact on your organization.					
Learning Effectiveness					
6. I learned new knowledge and / or skills from this course.	1	2	3	4	5
7. What were the 1-2 most important things you learned from this course and what was their relevance to your job?					
Supervisor Engagement					
8. After the course, my supervisor and I discussed how to apply what I learned on the job.	1	2	3	4	5

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