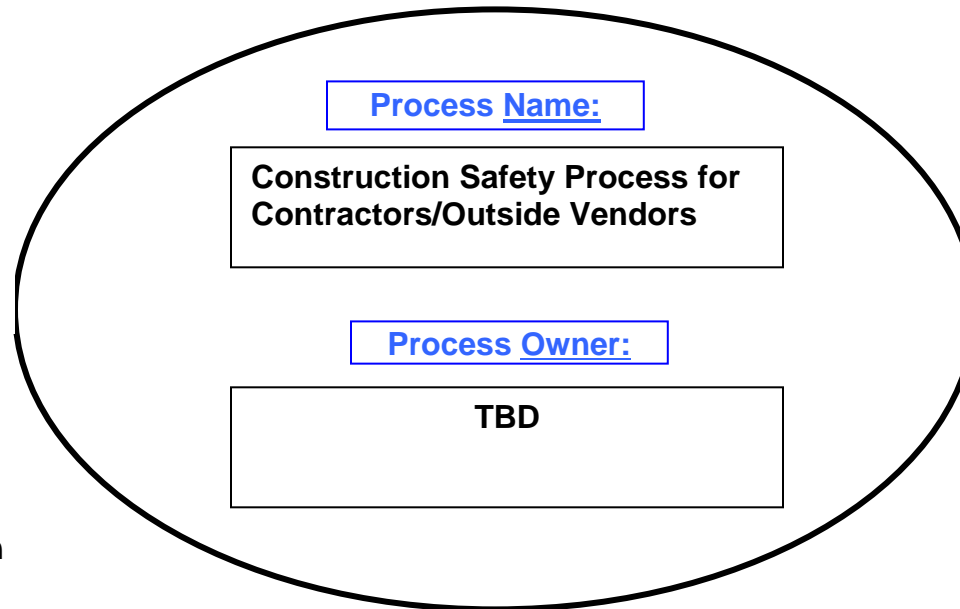


## Business Purpose / Measures

- **Business Purpose**  
Documents a common process for safety management on construction projects employing contractors/outside vendors



- **Customers:**  
Company Engineer

- **Starts With:**  
Project Approval defined in Section 2.2 of PMP

- **Ends With:**  
Contractor Evaluation in Project Closeout, Section 8.4 of PMP

<b>MEASUREMENTS</b>		
<b><u>Effectiveness</u></b>	<b><u>Efficiency</u></b>	<b><u>Adaptability</u></b>
<ul style="list-style-type: none"> <li>• Recordable Incidents Rate (R-IR)</li> <li>• Days Away Incident Rate (DA-IR)</li> <li>• Days Away Restricted/Transferred Incident Rate (DART-IR)</li> <li>• Serious Near Miss Incident Rate</li> </ul>	<ul style="list-style-type: none"> <li>• Cost Associated with Injuries (Currently tracked on Owner Controlled Insurance Program (OCIP) Projects)</li> <li>• Reduction of Legal Costs Associated with Injuries</li> <li>• Reduction of Overall Construction Costs</li> </ul>	<ul style="list-style-type: none"> <li>• Suitable for small &amp; large projects</li> <li>• Suitable for construction work in all Sites</li> <li>• Suitable for all types of contracting, Design/Build, Fixed Price, Project Delivery Program Management (PDPM), etc.</li> </ul>

# CONSTRUCTION SAFETY PROCESS

## Top Flow Down

<b>STEP 1: Develop Project-Specific Execution Plan</b>	<b>STEP 2: Screen Potential Bidders</b>	<b>STEP 5: Monitor Contractor Safety Performance During Construction Phase</b>	<b>STEP 6: Close Out Project</b>
1.1 Fulfill required Safety Training requirement	2.1 Select only potential bidders that have acceptable safety performance record	5.1 Review Pre-Task Plans	6.1 Perform Post Contract Evaluation
1.2 Establish Owner's Job-Site Safety Organization	2.2 Verify that bidder is registered with safety hazard awareness program (Projects in Michigan only)	5.2 Monitor Contractor Adherence to its Job-Site Safety Plan Discipline Process	6.2 Document Lessons Learned
1.3 Establish Emergency Response Procedures to Protect Project Team		5.3 Execute Plan for Awards, Promotions and Awareness	<b>Deliverables</b> > Contractor performance evaluated > Safety-related Lessons Learned documented
1.4 Incorporate Special Safety Conditions into project's common bid documents along with Company Construction General Conditions	<b>Deliverables</b> > Bid list screened for meeting acceptable standards	5.4 Collect and Publish Data for Performance Measurement	
1.5 Acquire site-specific hazard control programs and procedures and other site-specific documents governing safety of employees	<b>STEP 3: Confirm Requirements at Pre-Bid and Bid Clarification</b>	5.5 Ensure Safety issues are reviewed at Contractor's Project Meetings	
1.6 Identify necessary safety-related <u>Special Conditions</u> for inclusion into bid documents	3.1 Review Safety Related Expectations and Requirements at Pre-Bid Meeting	5.6 Monitor Performance of Contractors through Safety Walks	
1.7 Create or adopt safety-related information for inclusion into Contractor's Information Manual	3.2 Confirm at Bid clarification that all Safety Related Expectations and Requirements have been Comprehended in Bidder's Proposal	5.7 Conduct Safety Book Reviews	
1.8 Incorporate Construction Safety Statement of Philosophy into bid documents	3.3 Reconcile contractor-sponsored recognition plans (if presented) to Company-sponsored plans	5.8 Monitor Drug-Alcohol Screening Program Outside the State of Michigan	
1.9 Incorporate drug-alcohol screening requirements into project's common bid documents (Construction Regional Requirements: United States)	<b>Deliverables</b> > Safety requirements confirmed prior to contract award	5.9 Monitor compliance with safety hazardous awareness requirements per Special Safety Conditions (Michigan only)	
1.10 Incorporate Owner Controlled Insurance Program (OCIP) Requirements into the Common Bid Documents (Construction Regional Requirements: United States)	<b>STEP 4: Prepare to initiate Construction</b>	5.10 Review Contractor Serious Incident/Injury or near-miss of serious injury/incident (Ref Article 9.12 & 9.13 Company 1638, Article 2, Company 1638-A) - Article 2.12 & 2.13)	
1.11 Develop delivery plan for project awards, promotions, and awareness suggested by the established Template	4.1 Review Owner's Job-Site Safety Organization with the Contractor	5.11 Provide serious injury/incident or near-miss of serious injury/incident to Company Management	
1.12 Develop Project Team Orientation Plan	4.2 Review Contractor's Job-Site Safety Organization	5.12 Follow-up on Corporate Risk Management Project Assessment Reports' recommendations	
<b>Deliverables</b> > Company Engineer training requirements fulfilled > Safety requirements defined for bid documents	4.3 Review and accept Contractor's Job-Site Safety Plan and preliminary list of pre-task plans at pre-construction meeting; review details of site-specific safety related Special Conditions with Contractor	5.13 Encourage Contractors to Track Leading Indicators	
	<b>Deliverables</b> > Contractor safety preparations completed prior to construction initiation	<b>Deliverables</b> > Oversight of Contractor's safe execution of the work.	

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.1
- Task Name:** > Fulfill required Safety Training requirement
- Task Owner:** > Company Engineer
- Task Description:** > Fulfill required Safety Training requirements
- Deliverables:** > Working knowledge of Company 1638 Construction General Conditions and Special Safety Conditions, Construction Safety Process, and successful completion of safety hazard awareness modules
- Customer for Deliverables:** > Company Engineers (including direct contract employees) who administer contracts at this site; CPS personnel

### Necessary Inputs:

1. Safety Training Courses

### Source of Input:

1. CSP [Appendix G](#)

**Resources:** → Company Construction Safety

### Methodology:

- > Company Engineer gains training for safety-related administration of contracts with Contractors/outside vendors.

Note: The training outlined in CSP Appendix G represents minimum core training requirements that are essential for proper oversight of contracts.

The identified customers of this Statement of Work must receive this training prior to the execution of task 3.1 (pre-bid meeting.)

Specific job duties may require additional training.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.2
- Task Name:** > Establish Owner's Job-Site Safety Organization
- Task Owner:** > Site Project Manager
- Task Description:** > Establish Owner's Job-Site Safety Organization
- Deliverables:** > Owner's Job-Site Safety Organization Chart
- Customer for Deliverables:** > Bidders, GLOBAL PURCHASING, Company Engineers who administer contracts at this site, Local M.E. Director/WFG-FAM

### Necessary Inputs:

1. Bid & Award Process
2. Name of Plant M.E. Director or WFG-FAM
3. Name of Construction Professional Services (if present)
- 4.
5. Owner's Job-Site Safety Organization Template (Functional Responsibility)
6. Job-Site Safety Organization Template (Contractors)

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. Plant management organization chart
3. From previous award
- 4.
5. CSP [Appendix E](#)
6. Special Safety Conditions (United States)  
Special Safety Conditions (Canada)

- Resources:** > [Company Construction Safety](#) Company Construction Safety, Site Project Manager, CPS, Local M.E. Director / WFG-FAM, Company Engineer

### Methodology:

Note: On a large project it is important that the collective outputs of tasks 1.2 through 1.11 form a common "front-end" for all bid packages that will be issued for the project at this site. As such, the Site Project Manager is the Owner of this task and makes available these outputs to Company Engineer who will issue bid packages for this site. Company Engineer subsequently incorporates this common "front-end" to each bid package issued.

- > The Site Project Manager completes Task 1.2 of the Construction Safety Process during [Task 2.3 Assemble Bid Package](#).
- > The Site Project Manager uses the Owner's Job-Site Safety Organization template found in CSP Appendix E to develop the Owner's Job-Site Safety Organization.
- > Although the Local M.E. Director and WFG-FAM must both have awareness of contracted construction activities, an understanding must be established from the outset that only one will be the single point-of-contact for the Site Project Manager. The Site Project Manager facilitates this decision.
- > After this determination is made, the site's representative assists the Site Project

Manager in building the Owner's Job-Site Safety Organization by identifying other site resources for local health and safety information and safe work practices.

- > The Site Project Manager builds the Owner's Job-Site Safety Organization by accurately incorporating the names and personal data of the Owner's representatives in the appropriate boxes.
- > The Site Project Manager adds all names of Company Engineers administering contracts at the site and their respective Contractors. The data for Contractors is provided from the Contractor's individual Job-Site Safety Organization Charts that are provided by prime contractors to respective Company Engineers after contract award. Charts are based on the Job-Site Safety Organization Template found with the Special Safety Conditions.

Note: The Owner's Job-Site Safety Organization chart must continually be revised to reflect the Company Engineers and Contractors as they are added to the Job-Site.

Note: The initial Owner's Job-Site Safety Organization chart and subsequent updated versions are 1) maintained by the Site Project Manager for ready reference and, 2) distributed by the Site Project Manager to all Company Engineers administering contracts at the site. (Company Engineers distribute to contractors who post this information on individual safety bulletin boards and file in their Safety Books).

Note: The Company Engineer performs this task on sites not employing a Site Project Manager.

Memo: Tasks 1.2 through 1.12 are always performed by WFG-Capital Projects (CP) when CP has assigned a Site Project Manager.

Projects without significant WFG-Capital Projects facility content will not employ a Site Project Manager from Capital Projects, nevertheless tasks 1.2 through 1.12 will be performed by Capital Projects upon request.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.3
- Task Name:** > Establish Emergency Response Plans and Procedures to Protect the Project Team
- Task Owner:** > Site Project Manager
- Task Description:** > Establish emergency response plans and procedures to protect the project team. These plans and procedures will cover medical and rescue emergencies and, fire, tornado, or severe weather conditions or other cases of imminent danger, where “take shelter” or “evacuation” response may be necessary.
- Deliverables:**
- > Emergency Response Plans and Procedures that includes medical and rescue responses, defined severe weather shelter areas, emergency evacuation routes, and muster areas
  - > Communication Plans to both Company Project Team and to Contractors
- Customer for Deliverables:** > Company Engineers, Company Contract Employees, Contractors

### Necessary Inputs:

1. Bid & Award Process
2. Anticipated construction activity areas
3. Anticipated field office requirements for Company Project Team
4. Site’s current Emergency Response Plan & Procedures (ERP&P)

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. Company Engineer
3. Company Engineer
4. Local M.E. Director or WFG-FAM

- Resources:** > Construction Professional Services (CPS) (if available), Contractor Management, WFG Construction Safety Administrator, Local M.E. Director, WFG-FAM, local facility Security Chief, local public fire department, Site Project Engineer

### Methodology:

- > Site Project Manager completes Task 1.3 of the Construction Safety Process during [Task 2.3 Assemble Bid Package](#).
- > Site Project Manager solicits input from Company Engineers in order to define anticipated construction activity areas and anticipated field office locations for Company Project Team leaders. The methodology to establish emergency response and rescue plans will vary depending upon the type of construction site.
- > The potential need for specialized rescue e.g. confined space rescue, rescue from an elevation, entrapment in equipment, rescue from a structural collapse, or an excavation, etc. must be considered and where applicable included in the Emergency Response Plans and Procedures.

Note: It is important for the Site Project Manager to understand that a call for medical emergency response will summon an ambulance. The Site Project Manager must also identify the contract for specialized rescue. The need to request rescue services at the time of the initial call for emergency services must also be made clear to the project team. The Contractor must also identify any specialized rescue services that may be required for its scope of work.

- > (The process to communicate the Emergency Response Plans and Procedures to the Company Project Team and to Contractors is common and is detailed later in the methodology).
  - a) For “Greenfield” sites or sites in which Company does not have an established ERP&P:
    - Site Project Manager contacts local public fire department to establish an Emergency Response Plan for medical/fire/rescue emergencies, which will include telephone contact numbers, accessibility routes and other pertinent information.
    - The Site Project Manager or the Company Engineer is encouraged to plan and/or support the Contractor in conducting emergency response/rescue drills with the local fire department or other emergency services.
    - In the case of a location of extreme remoteness, provision should be made for a Contractor to provide for medical/fire/rescue response. Note: Special Conditions will be written into the contract for this service. Company Global Security is a vital resource in such circumstances.
    - Site Project Manager establishes plans and procedures for Company Project Team Members that address
      - designated shelter areas and notification for tornado/severe weather,
      - evacuation routes and muster areas for fire emergency
      - medical emergency.
      - rescue emergency
    - Site Project Manager communicates above emergency response plans and procedures to his own business unit’s Business Continuity Plan (BCP) Coordinator and completes ERP&P procedure under BCP Coordinators guidance.
    - Site Project Manager establishes a protocol that must be followed by any site visitors. This will include elements of the ERP&P.
  - b) For “Brownfield” sites at which Company does have an established ERP&P procedure:
    - The Site Project Manager develops the following plans as proposals that will be reviewed in a future meeting with the local M.E. Director or WFG FAM at the conclusion of Task 1.7. The site Emergency Response Coordinator (ERC), should also attend that portion of the meeting.

Note: The role of the ERC is usually filled as follows: a) for manufacturing facilities – Personnel Director, b) for non-manufacturing facilities – WFG-FAM.

- The Site Project Manager, working in conjunction with the local M.E. Director or WFG-FAM and the site’s ERC, reviews site construction plans and anticipated field office requirements for the Company Project Team Members.

- Site Project Manager collaborates with the site's ERC in proposing an addendum to the local site's ERP&P procedure. The addendum broadens the identification of shelter areas for tornado/severe weather, evacuation routes and muster areas for fire emergency, the notification process for each type of emergency, and the medical/rescue Emergency Response Plans and Procedures.
  - The Site Project Manager of the Company Engineer is encouraged to support/promote the Contractor in conducting emergency response/rescue drills with the local fire department or other emergency services. On "Brownfield" sites these drills must be coordinated through the local plant security department.
- > The communication scheme to the Company Project Team and to Contractors is common for both "Greenfield" and "Brownfield" sites.
- This information is reviewed at the Contractor's Pre-Construction Meetings and with Company Engineers. Contractors use the Contractor's Information Manual to assist them in the development of their individualized Emergency Response Plans that become part of their respective Job-Site Safety Plans.
  - Site Project Manager ensures that field offices housing Company Project Team Members and construction areas have notification plans and response procedures for emergencies clearly posted.
  - Site Project Manager ensures emergency response plan is included in Company Project Team and Contractor Pre-Construction Meeting orientations.

Note: Company Employees must utilize established local Company Medical Facility when available.

Note: For non-life threatening medical treatment: In the event that the site would adopt an OCIP agreement, the selection of a medical treatment facility should be consistent with the process established by Corporate Risk Management.

Note: The Company Engineer performs this task on sites that do not employ a Site Project Manager.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.4
- Task Name:** > Incorporate Special Safety Conditions into project's common bid documents along with Company Construction General Conditions.
- Task Owner:** > Site Project Manager
- Task Description:** > Incorporate Special Safety Conditions into project's common bid documents along with Company Construction General Conditions.
- Deliverables:** > Special Safety Conditions and Company General Conditions incorporated into common bid documents.
- Customer for Deliverables:** > Bidders, Company Engineer, CPS

### Necessary Inputs:

1. Bid & Award Process
2. Special Safety Conditions
3. **Company** Construction General Conditions

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. [Special Safety Conditions \(United States\)](#)  
[Special Safety Conditions \(Canada\)](#)
3. [Company Construction General Conditions Company1638 \(Link to Canada Company 1638\)](#)

- Resources:** > **Company** Construction Safety Company Construction Safety, Construction Safety User's Group (CSUG)

### Methodology:

- > The Site Project Manager completes Task 1.4 of the Construction Safety Process during Task 2.3 of the Assemble Bid Process.
- > The Site Project Manager incorporates all Special Safety Conditions into the common bid package. The Site Project Manager acquires these by visiting the Regional WFG Capital Projects website, clicking on Reference Materials, and then accessing the link to Company 1638 General Conditions. The Company 1638 Construction General Conditions are found at the same site.

Note: Company Engineer performs this task on sites that do not employ a Site Project Manager.

Note: The Safety Hazard Awareness Training Special Safety Condition is not included for projects outside of Michigan.



# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.5
- Task Name:** > Acquire site-specific hazard control programs and procedures and other site-specific documents governing safety of employees
- Task Owner:** > Site Project Manager
- Task Description:** > Acquire local safety-related documents
- Deliverables:** > Acquisition of local safety-related documents that will provide reference in the formulation of Special Conditions (Task 1.6) and Contractor's Information Manual (Task 1.7)
- Customer for Deliverables:** > **Company** Engineer, other Company engineers who will manage contracts at this site, CPS

### Necessary Inputs: (Examples)

1. Bid & Award process
2. See CSP Appendix 'A' for Examples
3. Site-specific Employee Safety Handbook (if any)
4. Site-specific safety requirements for Contractors (if any)
5. Site-specific Security and Fire Protection requirements for Contractors (if any)

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. Local M.E. Director or WFG-FAM
3. Local M.E. Director or WFG-FAM
4. Local M.E. Director or WFG-FAM
5. Local M.E. Director or WFG-FAM

- Resources:** > **Company** Construction Safety Company Construction Safety, CPS, Plant Safety, Local M.E. Director / WFG-FAM

### Methodology:

- > The Site Project Manager completes Task 1.5 of the Construction Safety Process during Task 2.3 of the Bid and Award Process.
- > Site Project Manager acquires from the Local M.E. Director or WFG-FAM the site's local hazard control programs and procedures documents, and (if in existence), the site's Employee Safety Handbook, site-specific safety requirements for Contractors, and site-specific Security and Fire Protection requirements.
- > Site Project Manager catalogues documents obtained and provides notification to Company Engineers of their existence and where these may be obtained in the event they may be needed in the future for reference.

Note: The above documents are generally not published verbatim as Special Conditions or as entries in the Contractor's Information Manual. Certain documents such as site-specific documentation of existing anchorage points for Personal Fall Arrest Systems (PFAS's) and site-specific program to control confined space entry are of particular reference value during the review of Contractor's pre-task plans. These may be made available (not published) to qualified contractor management personnel under the strict oversight of the Company Engineer.

Note: Company Engineer performs this task on sites that do not employ a Site Project Manager.

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 1.6
- Task Name:** > Identify necessary safety-related Special Conditions for inclusion into bid documents
- Task Owner:** > Site Project Manager
- Task Description:** > Include safety-related Special Conditions in Bid Documents
- Deliverables:** > Special Conditions (that are safety-related)  
> Note: there may be other Special Conditions that need to be included that are not safety-related. In that case the Special Conditions determined here would only be part of the total.
- Customer for Deliverables:** > Bidders; GLOBAL PURCHASING, other Company Engineers who will manage contracts at this site, CPS

#### Necessary Inputs:

1. Bid & Award Process
2. Special Safety Conditions
3. Site-specific hazard control programs
4. Site-specific Employee Safety Handbook (if any)
5. Site-specific safety requirements for Contractors (if any)
6. Site-specific Security and Fire Protection requirements for Contractors (if any)
7. Template for Awards, Recognition, Promotions, and Awareness

#### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. Output of Task 1.4
3. Output of Task 1.5
4. Output of Task 1.5
5. Output of Task 1.5
6. Output of Task 1.5
7. CSP [Appendix D](#)

**Resources:** > [Company Construction Safety](#) [Company Construction Safety](#), Plant's Safety Department, Local M.E. Director, WFG-FAM

#### Methodology:

- > The Site Project Manager completes Task 1.6 of the Construction Safety Process during Task 2.3 of the Assemble Bid Process
- > The Site Project Manager compares the Special Safety Conditions to the inputs (2), (3), (4) and (5) above and notes conflicts or inconsistencies between the documents.

Note: After completing the review and distillation of the plants' hazard control programs, the applicable local plant health and safety work practices must be incorporated as Special Conditions into the contract.

"Where the nature of the construction or maintenance work requires that the

contractor's employees work in proximity to Company employees, applicable safe work practices will be adopted".

It is incumbent upon both the Site Project Manager and the Local M.E. Director or WFG-FAM to recognize that local published procedures suitable for the management of the local Company workforce may not be suitable for incorporation into the bid documents as Special Conditions, as the Special Safety Conditions already address applicable Company safe work practices.

- > Weighing these factors, the Site Project Manager proposes Special Conditions for review with the Local M.E. Director or WFG FAM. These proposals require concurrence by the Site Project Manager and Local ME. Director/WFG-FAM prior to issuance of any bid documents.
- > Site Project Manager consults CSP Appendix D to determine the responsibility that the Contractor will have for promotions, if any. These requirements are also incorporated into the bid documents as a Special Condition.

Note: Company Engineer performs this task on sites that do not employ a Site Project Manager.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.7
- Task Name:** > Create or adopt safety-related information for inclusion into Contractor's Information Manual
- Task Owner:** > Site Project Manager
- Task Description:** > Create or adopt safety-related procedures for inclusion into Contractor's Information Manual
- Deliverables:** > Safety-related procedures as part of Contractor's Information Manual
- Customer for Deliverables:** > Contractors; other Company Engineers who will administer contracts at this site, CPS

### Necessary Inputs:

1. Bid & Award Process
2. See CSP Appendix 'B' for Examples
3. Special Conditions incorporating procedures
4. Serious Injury and Near Miss Notification Process Flowchart
5. **Company** Global Security Manual – Chapter 15

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. Output of task 1.5
3. Output of task 1.6
4. CSP [Appendix J](#)
5. [Welding, Cutting and Allied Processes](#)

- Resources:** > **Company** Construction Safety Company Construction Safety, CPS, Local M.E. Director or WFG-FAM, Plant Safety

### Methodology:

- > The Site Project Manager completes Task 1.7 of the Construction Safety Process during Task 2.3 of the Assemble Bid Process.
- > The site-specific documents acquired earlier in Task 1.5 and referenced in Task 1.6, are again referenced by the Site Project Manager.
- > Special Conditions proposed in Task 1.6 which depend on their proper execution by following explicit procedures must be included in the proposed Contractor's Information Manual.
- > Also included in the Contractor's Information Manual is information that the Contractor will utilize in the preparation and administration of his Job-Site Safety Plan which will assist him in the subsequent safe execution of tasks or allow for timely responses (e.g. local emergency numbers).
- > The proposed Special Conditions (output of Task 1.6), and the proposed Contractor's Information Manual are concurred upon in a meeting between the Site Project Manager and Local M.E. Director or WFG-FAM. This meeting is an element of the continuing dialogue between the parties that should occur over the course of the project.
- > The Contractor's Information Manual is to be distributed by the Site Project Manager to Company Engineers who will administer contracts at the site. These manuals are to

additionally include for Company Engineers, the completed “Serious Injury and Near Miss Notification Process Flow Chart” (CSP Appendix J).

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.8
- Task Name:** > Incorporate Construction Safety Statement of Philosophy into bid documents
- Task Owner:** > Site Project Manager
- Task Description:** > Site Project Manager ensures that Statement of Philosophy with regard to construction safety is incorporated into all bid documents that will be issued for the project.
- Deliverables:** > Statement of Philosophy
- Customer for Deliverables:** > Company Engineers, Bidders, CPS

### Necessary Inputs:

1. Bid & Award Process
2. Statement of Philosophy
3. Bid Package Template

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. CSP [Appendix C](#)
3. PMP Forms Index

**Resources:** > Company Construction Safety Company Construction Safety

### Methodology:

- > Site Project Manager incorporates Task 1.8 of the Construction Safety Process during Task 2.3 of the Assemble Bid Process.
- > Site Project Manager incorporates Statement of Philosophy located in CSP Appendix 'C' into the common "front-end" that is included in all bid documents issued for the site.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.9
- Task Name:** > Incorporate drug-alcohol screening requirements into project's common bid documents for the Continental U.S. outside of Michigan
- Task Owner:** > Site Project Manager
- Task Description:** > Incorporate drug-alcohol screening requirements into project's common bid documents.
- Deliverables:** > Special Condition for drug testing program
- Customer for Deliverables:** > Bidders; GLOBAL PURCHASING other Company Engineers who administer contracts with vendors/outside Contractors at this site.

### Necessary Inputs:

1. Bid & Award Process
2. Drug Testing Program for the Continental U.S. outside of Michigan: Company2Work
3. Drug Testing Program Special Condition

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. Special Conditions Template
3. Site Project Manager

- Resources:** > Company2Work Administrator, Company Construction Safety Company Construction Safety, CPS

### Methodology:

- > The Site Project Manager completes Task 1.9 of the Construction Safety Process during Task 2.3 of the Assemble Bid Process.
- > Site Project Manager adheres to following decision process:
  1. For projects outside of Michigan and within Continental U.S.:
    - a) Site Project Manager acquires copy of drug-alcohol screening policy from Special Condition Template and weighs implementation barriers against Company's belief that drug-alcohol screening is a positive step toward achieving a safe workplace. Barriers can include:
      - i. Contracts under this project's control represent a minority share of the total contracting being performed at the site, and segregation of employees screened is problematic.
      - ii. lead time to implement drug-alcohol screening program is insufficient

Note: Knowledge of local allowable drug-alcohol screening tests as provided for by local Union agreement and/or local statutes must be determined by investigations performed by the Site Project Manager. The Company2Work Administrator is the recommended resource for this task.

2. If benefits outweigh barriers, and Site Project Manager does not use Company2Work drug testing program, Site Project Manager writes a Special Condition to require a drug / alcohol screening program.

Note: Company Engineer performs this task on sites that do not employ a Site Project Manager.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.10
- Task Name:** > Incorporate Owner Controlled Insurance Program (OCIP) Requirements into the Common Bid Documents for Construction Regional Requirements: United States
- Task Owner:** > Site Project Manager
- Task Description:** > Incorporate requirements that are mandated by Corporate Risk Management (CRM) into the common bid documents for all contracts that involve on-site labor (if the project is covered by an OCIP agreement).
- Deliverables:** > OCIP Special Conditions
- Customer for Deliverables:** > Bidders; Company Engineers who will administer contracts with contractors/outside vendors at this site.

### Necessary Inputs:

1. Bid & Award Process
2. Company Corporation OCIP Manual of insurance procedures

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. CRM (Corporate Risk Management) [CRM Manual](#)

- Resources:** > CRM Loss Control Manager, CPS

### Methodology:

Note: The Corporate Risk Management sponsored OCIP process should be referenced. The methodology below describes only the tasks required specifically by the Site Project Manager. The management of individual contracts with an OCIP clause is fully covered in the Company Corporation OCIP Manual and the OCIP process map of insurance procedures.

- > The Site Project Manager completes Task 1.10 of the Construction Safety Process during Task 2.3 of the Assemble Bid Process.
- > The Site Project Manager establishes an agreement with a local preferred medical provider(s) for treatment of all minor or non-life threatening injuries and relieves the potential contractors of this responsibility. Contractors are obligated to utilize the preferred provider thus secured.
- > The Site Project Manager publishes the names and terms of the agreements with the above service to all Company project team members for inclusion into all bid documents.
- > The Site Project Manager provides outputs of Tasks 1.2 through 1.11 to all Company Engineers (and CPS, if present) for common incorporation into all bid documents that will be issued for this site over the course of the project.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.11
- Task Name:** > Develop delivery plan for project awards, promotions, and awareness suggested by the established template
- Task Owner:** > Site Project Manager
- Task Description:** > Using the plan for Project Awards, Recognition, Promotions and Awareness, identify the project safety promotions, events, and awards that apply to the project size and establish an execution plan.
- Deliverables:** > An execution plan to stage recognition events and promotions and to deliver awards that are outlined in the template that is found in CSP [Appendix D](#).
- Customer for Deliverables:** > Contractors, all site Company Engineers

### Necessary Inputs:

1. Bid & Award Process
2. Template – Awards, Recognition, Promotions and Awareness

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. CSP [Appendix D](#)

- Resources:** > Company Engineers, CPS

### Methodology:

- > The Site Project Manager completes Task 1.11 of the Construction Safety Process during Task 2.3 of the Assemble Bid Process.
- > The Site Project Manager consults the Template of Awards, Recognition, Promotions and Awareness found in CSP [Appendix D](#) for the Company-sponsored requirements of project that is planned to be executed. The elements that apply may require the assistance of a CPS or a lead Contractor to execute and the Site Project Manager should ensure that those requirements are included in their scope.
- > A preliminary timing schedule should be formulated by the Site Project Manager and needs to accompany the applicable elements that will be executed.
- > In the event that more than one organization is represented at the site, the Site Project Manager must ensure that all organizations will execute to a common plan. All contracts that are issued for this project will be administered identically. WFG-CP will take the lead in this activity.
- > The Site Project Manager reviews the elements selected from the Template with the Owner's Job-Site Safety Organization to ensure uniform understanding and compliance.
- > The Company Engineer performs this task on sites that do not employ a Site Project Manager.

Note: The budget source of promotions, events, and awards that Company will sponsor is to be taken from the project's Project Management budget. Recommended budget to be set at 0.04% of the Project Management budget or 0.008% of project budget.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 1.12
- Task Name:** > Develop Project Team Orientation Plan
- Task Owner:** > Site Project Manager
- Task Description:** > Assemble information to be used by Project Team and establish orientation plan
- Deliverables:** > Project Team is oriented to site safety requirements
- Customer for Deliverables:** > Company Engineers (including direct contract employees and summer interns), CPS employees, A/E firms, Process Engineers, Visitors, Service Providers (including Business agents)

### Necessary Inputs:

1. Bid & Award Process
2. Owner's Job-Site Safety Organization
3. Emergency Response Plan
4. Special Safety Conditions
5. Special Conditions
6. Contractor's Information Manual
7. Drug-alcohol Screening requirements
- 8.
9. Company Visitor Safety Protocol
10. Training, Orientation, and Drug Screening Matrix for Company Employees and Service Providers

### Source of Input:

1. [Task 2.3 Assemble Bid Package](#)
2. Output of Task 1.2
3. Output of Task 1.3
4. Output of Task 1.4
5. Output of Task 1.6
6. Output of Task 1.7
7. Output of Task 1.9
- 8.
9. Local M.E. Director or WFG-FAM
10. [CSP Appendix G](#)

- Resources:** > Company Engineer, Company Construction Safety Company Construction Safety, Site Project Manager

### Methodology:

- > The Site Project Manager completes Task 1.12 of the Construction Safety Process during Task 2.3 of the Assemble Bid Process.
- > Site Project Manager assembles inputs from "Necessary Input" listing.
- > Site Project Manager establishes delivery method and schedule, and provides facility resources to deliver project team orientations.
- > Site Project Manager apprises all Company Engineers and CPS personnel of orientation requirements for themselves and service providers who will frequent the site.

Note: For a "greenfield" site, the Site Project Manager must develop a Company Visitor Safety Protocol.

**Step #1 and RASI Chart**

**Roles**

R = Responsibility

A = Approval

S= Support

I = Informed

**Step #1: Develop Project-Specific Execution Plan**

Step 1	Who/What	Company Engineer	Engineering Manager	Director of Capital Projects	Company Construction Safety Company	Construction Safety Company	Plant Resources (Safety, Environmental, Security, etc.)	Site ME Director/WFG FAM	CPS (If Applicable)	Contractor/Bidder	GLOBAL PURCHASING	Company Prequal Team	Corporate Risk Management	PMM	Site Project Manager	Company Work Administrator
1.1	Fulfill required Safety Training requirement	R			S	I	I	I							I	
1.2	Establish Owner's Job-Site Safety Organization	S/I			S	I	S/I		S						R	
1.3	Establish Emergency Response Procedures to Protect Project Team	S/I			S				S/I	I	I	S			R	
1.4	Incorporate Special Safety Conditions into project's common bid documents along with Company Construction General Conditions	I			S			S	S/I	I	I				R	
1.5	Acquire site-specific hazard control programs and procedures and other site-specific documents governing safety of employees	I			S	S	S	S/I	I						R	
1.6	Identify necessary safety-related Special Conditions for inclusion into bid documents (Ref. Bid & Award Guide 3.2)	I			S	S	S	S/I	I	I					R	
1.7	Create or adopt safety-related procedures for inclusion into Contractor's Information Manual	I			S	S	S	S/I	I	I					R	
1.8	Incorporate Construction Safety Statement of Philosophy into bid documents	I	S		S			I	I	I	I		I		R	
1.9	Incorporate drug-alcohol screening requirements into project's common bid documents	I			S	I	I	S/I	I	I		I			R	S
1.10	Incorporate Owner Controlled Insurance Program (OCIP) Requirements into the Common Bid Documents	I			I	I	I	I	I	I		S			R	
1.11	Develop delivery plan for project awards, promotions, and awareness suggested by the established Template	S/I						I	S/I	I			I		R	
1.12	Develop Project Team Orientation Plan	S			S	S	I	S/I							R	

**Key Deliverables: Company Engineer training requirements fulfilled.  
Safety requirements defined for bid documents.**

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 2.1
- Task Name:** > Select only potential bidders that have acceptable safety performance record
- Task Owner:** > Company Engineer
- Task Description:** > Use safety performance data as a selection criteria for potential bidders.
- Deliverables:** > Preliminary list of bidders
- Customer for Deliverables:** > GLOBAL PURCHASING

### Necessary Inputs:

1. Bid & Award Process
2. Individual potential bidder's current EMR, current R-IR, current DA-IR and current DART-IR (Construction Regional Requirements: United States)

Individual potential bidder's current (TBD)  
(Construction Regional Requirements:  
Canada)

3. Potential list of bidders

### Source of Input:

1. [Task1.1 Fill out the Request for Global Sourcing Form and Forward to GLOBAL PURCHASING](#)

2. Pre-qualified database or supplied by potential bidder

3. Pre-qualified database or other GLOBAL PURCHASING source

- Resources:** > GLOBAL PURCHASING, Pre-qualification Manager for specific Business Unit (if existing), Company Engineer

### Methodology:

- > The Company Engineer completes Task 2.1 of the Construction Safety Process during Step 1 of the Assemble Bid Process.
- > Construction Regional Requirements: United States  
Company Engineer acquires potential bidders' current EMR's, current Recordable Incident Rate (R-IR), current Days Away Incident Rate (DA-IR), and current Days Away, Restricted or Transfer Incident Rate (DART-IR) from either an established database of pre-qualified bidders, or from soliciting the above data from the potential bidders on an individual basis.  
Construction Regional Requirements: Canada  
TBD
- > Company Engineer ensures that potential bidders, that are not in a pre-qualified database, meet at least minimum criteria (as directed by GLOBAL PURCHASING), prior to receiving any consideration.

> Company Engineer considers safety performance (i.e. lower EMR, lower R-IR, lower DA-IR, and lower DART-IR are better) in preparing Global Sourcing form for submission to GLOBAL PURCHASING.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 2.2
- Task Name:** > Verify that bidder is registered with safety hazard awareness program (Projects in Michigan only).
- Task Owner:** > Company Engineer
- Task Description:** > Verify that bidder is registered with safety hazard awareness program (Michigan only).
- Deliverables:** > Finalized proposed list of bidders
- Customer for Deliverables:** > Company Engineer

### Necessary Inputs:

1. Bid & Award Process
2. Performance-measured acceptable list of bidders from Task 2.1

### Source of Input:

1. [Task 1.1 Fill out the Request for Global Sourcing Form and Forward to GLOBAL PURCHASING](#)
2. Output of [Task 2.1](#)

**Resources:** > Company Construction Safety Company Construction Safety, GLOBAL PURCHASING, Contractor

### Methodology:

Note: This step is currently required only for projects in Michigan. Reference: Special Safety Condition: "safety hazard awareness program and MI M.U.S.T. “.

- > The Company Engineer completes Task 2.1 of the Construction Safety Process during Step 1 of the Assemble Bid Process.
- > Company Engineer accesses safety hazard awareness program and confirms that proposed bidder is registered with program.
- > In the event bidder is unregistered, Company Engineer advises contractor that he must register in order to receive consideration for bidding Company Work.

Note: any union contractor can register; non-union contractors cannot be registered.

- > If bidder fails to register in timely manner, Company Engineer removes bidder from proposed bid list.



**Step #2 and RASI Chart**

**Roles**

R = Responsibility

A = Approval

S= Support

I = Informed

**Step #2: Screen Potential Bidders**

		Company Engineer	Engineering Manager	Director of Capital Projects	Company Construction Safety	Company Construction	Plant Safety	SITE ME Director/WFG FAM	CPS (If Applicable)	Contractor/Bidder	GLOBAL PURCHASING	WFG Prequal Team	Corporate Risk Management	PMM	Site Project Manager	Company2Work Administrator
<b>Step 2</b>	<b>Who/What</b>															
<b>2.1</b>	Select potential that have acceptable safety performance record	R	I					S	S	A	S					
<b>2.2</b>	Verify that bidder is registered with safety hazardous awareness program (Note: projects in MI only)	R			I		I		S	I						S

**Key Deliverables: Bid list screened for meeting acceptable standards**

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 3.1
- Task Name:** > Review Safety Related Expectations and Requirements at Pre-Bid Meeting
- Task Owner:** > Company Engineer
- Task Description:** > Review all safety related elements contained in the Construction Pre-bid Meeting Agenda at pre-bid meeting
- Deliverables:** > Completed pre-bid meeting with all safety elements that will influence the bid reviewed
- Customer for Deliverables:** > Bidders

### Necessary Inputs:

Pre-bid checklist that includes:

1. Bid and Award Process
2. Construction Pre-Bid Meeting Agenda
3. Special Safety Conditions
4. Special Conditions
5. Contractor required sponsorship for promotions
6. **Company** Health & Safety Philosophy
7. Drug-alcohol screening requirements (if any)
8. OCIP requirements (if any)
9. Site emergency plan & prevention procedure
10. Contractor's Information Manual

### Source of Input:

PMP Forms/Procedures Index – Construction Pre-bid Meeting Agenda

1. Task 4.1 from PMP Bid & Award
2. [PMP Forms/Procedure Index](#)
3. Output of Task 1.4
4. Output of Task 1.6
5. Output of Task 1.11
6. CSP [Appendix C](#)
7. Output of Task 1.9 (Construction Regional Requirements: United States)
8. Output of Task 1.10 (Construction Regional Requirements: United States)
9. Output of Task 1.3
10. Output of Task. 1.7

**Resources:** > **Company** Construction Safety Company Construction Safety, CPS, Site Project Manager

### Methodology:

- > The Company Engineer completes Task 3.1 of the Construction Safety Process during Task 4.1 of the Assemble Bid Process.
- > Company Engineer completes Construction Pre-bid Meeting Agenda prior to meeting.
- > Company Engineer draws attention to bidders to all safety related elements in the Agenda.
- > Company Engineer responds to questions from bidders with written clarification.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 3.2
- Task Name:** > Confirm at Bid clarification that all Safety Related Expectations and Requirements have been Comprehended in Bidder's Proposal
- Task Owner:** > CompanyEngineer
- Task Description:** > Confirm that bidder has included in his bid all safety-related elements reviewed at pre-bid meeting
- Deliverables:** > Confirmation from bidder that all safety-related elements are included in his proposal
- Customer for Deliverables:** > Company Engineer

### Necessary Inputs:

1. Bid & Award Process
2. Bidder's Proposal
3. Safety-related elements that may influence bid
4. Bid Clarification Meeting Checklist

### Source of Input:

1. [Task 5.1 Assemble Bid Process](#)
2. Bidder
3. Output of Task 3.1
4. PMP Forms/Procedures Index

**Resources:** > Company Construction Safety, CPS, Company Engineer, Bidder

### Methodology:

- > The Company Engineer completes Task 3.2 of the Construction Safety Process during Task 5.1 of the Assemble Bid Process.
- > Company Engineer reviews safety-related elements on pre-bid checklist with bidder and solicits confirmation of each item from bidder.
- > Company Engineer instructs bidder to deliver to GLOBAL PURCHASING buyer in writing any items requiring confirmation from this review.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 3.3
- Task Name:** > Reconcile Contractor-sponsored recognition plans (if presented) to Company -sponsored plans
- Task Owner:** > Company Engineer
- Task Description:** > Review Contractor-sponsored recognition plans; reconcile these to Company -sponsored plans
- Deliverables:** > A Contractor-sponsored recognition plan that is compatible with the Company -sponsored plan
- Customer for Deliverables:** > Contractors, other Company Engineers who will manage Contractor's at this site

### Necessary Inputs:

1. Bid & Award Process
2. Identified Project Awards, Promotions and Awareness
3. Contractor sponsored recognition proposal

### Source of Input:

1. [5.1 Assemble Bid Process](#)
2. Output of Task 1.11
3. Bidder's proposal

- Resources:** > Site Project Manager, CPS

### Methodology:

- > The Company Engineer completes Task 3.3 of the Construction Safety Process during Task 5.1 of the Assemble Bid Process.
- > For projects where a single prime contractor is present:
  - The Company Engineer reviews the Contractor's plan for awards, promotion and awareness for the following factors:
    - a) employee awards
    - b) promotions and awareness (such as Safety bulletin boards, etc.)
  - The Company Engineer reconciles the Contractor's plan for awards, promotions, and awareness to Company-sponsored plans suggested by the Template of Project Awards, Promotions and Awareness, and augments the Contractor's plans where necessary.
  - The Company Engineer consults the Template of Project Awards, Promotions and Awareness for suggested awards to the Contractor (management).
  - The Company Engineer revises the plan derived by Task 1.11, as necessary.
- > For projects where several prime Contractors are present:
  - The Company Engineer accepts the Contractor-sponsored recognition plan and advises the Site Project Manager (if present) of such plans.

**Note:** In the event the Contractor-sponsored plans for awards, promotions, recognition and awareness overlap requirements of CSP Appendix D, the Company-sponsored plan for project awards, promotions and awareness derived by Task 1.11 may be omitted.

**Step #3 and RASI Chart**  
**Roles**

R = Responsibility

A = Approval

S= Support

I = Informed

**Step #3: Confirm Requirements at Pre-Bid and Bid Clarification**

Step 2	Who/What	Company Engineer	Engineering Manager	Director of Capital Projects	Company Construction Safety	Plant Safety	SITE ME Director/WFG FAM	CPS (if Applicable)	Contractor/Bidder	GLOBAL PURCHASING	WFG Prequal Team	Corporate Risk Management	PMM	Site Project Manager	Company2Work Administrator
3.1	Review safety-related expectations and requirements at pre-bid meeting	R	I		S	I	I	S	I						
3.2	Confirm at bid clarification that all safety-related expectations and requirements have been comprehended in bidder's proposal	R	I		S	I	I	S	S	I					
3.3	Reconcile Contractor-sponsored recognition plans (if presented) to Company-sponsored plans	R	I					S	I			S		I	

**Key Deliverables: Safety requirements confirmed prior to contract awards**

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 4.1
- Task Name:** > Review Owner's Job-Site Safety Organization with the Contractor
- Task Owner:** > Company Engineer
- Task Description:** > Owner's Job-Site Safety Organizational Chart with the Contractor
- Deliverables:** > Familiarize Contractor with Company's on-site safety organization
- Customer for Deliverables:** > Contractor

#### Necessary Inputs:

1. Project Management Process
2. Owner's Job-Site Safety Organization Chart

#### Source of Input:

1. Task 6.3 – Project Management Process [PMP Task 6.3](#)
2. CSP [Appendix E](#)

- Resources:** > Company Construction Safety, Local M.E. Director, WFG-FAM, Site Project Manager, Contractor, CPS

#### Methodology:

- > The Company Engineer completes Task 4.1 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Company Engineer reviews Owner's Job-Site Safety Organization with the Contractor, who is to retain a copy of it in his Safety Book, and share it with his subcontractors and his employees.
- > Company Engineer furnishes Contractor with list of Owner contacts (Company Engineer is first priority) in the event that Contractor sustains serious injury/incident or serious near-miss injury/incident (required by Articles 9.12, 9.13 Company 1638, Article 2, Company 1638-A).
- > Company Engineer emphasizes to Contractor that Company Engineer is the single-point-of-contact with respect to the Contractor reporting any Construction Contractor safety-related issues.
- > For sites that employ a Site Project Manager:
  - Company Engineer informs Contractor of Site Project Manager's role of Owner's final authority for safety-related issues for the entire site.

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 4.2
- Task Name:** > Review Contractor's Job-Site Safety Organization
- Task Owner:** > Company Engineer
- Task Description:** > Company Engineer to verify completeness of Contractor's Job-Site Safety Organization
- Deliverables:** > Accurate Contractor Job-Site Safety Organization
- Customer for Deliverables:** > Company Engineer, Contractor

#### Necessary Inputs:

1. Project Management Process
2. Contractor's Job-Site Safety Organization Template
3. Contractor's Job-Site Safety Organization

#### Source of Input:

1. Task 6.3 – Project Management Process [PMP Task 6.3](#)
2. [Contractor's Job-Site Safety Template](#)
3. Contractor

- Resources:** > Company Construction Safety, CPS, Contractor

#### Methodology:

- > The Company Engineer completes Task 4.2 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Company provides template to the Contractor under the Special Safety Conditions in the bid documents. Company Engineer reviews the job-site safety organization provided by the Contractor for clarity and completeness.
- > Company Engineer highlights any discrepancies between the Contractor provided documentation and the Company template requirements.
- > Contractor corrects any errors; makes necessary changes as required, and resubmits.
- > Company Engineer incorporates Contractor's job-site safety organization into the overall Owner's job-site safety organization.

Note: For sites that employ a Site Project Manager, the Company Engineer provides this information to the Site Project Manager for incorporation into the Owner's job-site safety organization.

- > Contractor files job-site safety organization in Safety Book. Changes in personnel must be noted on this chart. It is the Contractor's responsibility to always be current.

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 4.3
- Task Name:** > Review and accept Contractor's Job-Site Safety Plan and preliminary list of pre-task plans at pre-construction meeting; review details of site-specific safety related Special Conditions with Contractor
- Task Owner:** > Company Engineer
- Task Description:** > Gain assurance from Contractor through required Contractor deliverables that initial construction activities can proceed safely
- Deliverables:**
- > Contractor's Job-Site Safety Plan
  - > Contractor acknowledged understanding of requirements of site-specific safety related Special Conditions that are necessary to include in relevant pre-task plans
- Customer for Deliverables:** > Contractors, CPS

#### Necessary Inputs:

Pre-construction Meeting Checklist which includes:

1. Project Management Process
2. Contractor Job-Site Safety Plan in accordance with template provided in the SSC's
3. Contractor's preliminary list of pre-task plans tied to work schedule
4. Safety elements reviewed at pre-bid and bid clarification meetings
5. Contractor's detailed pre-task plan for initial work
6. Company Site Visitor Safety Protocol
7. Project Training, Orientation, and Drug Screening Matrix for Contractors

#### Source of Input:

PMP Forms/Procedures Index – Pre-Construction Meeting Checklist:

1. Task 6.3 – Project Management Process [PMP Task 6.3](#)
2. Contractor
3. Contractor
4. Output of [Task 3.1](#)
5. Contractor
6. Local M.E. Director or WFG-FAM
7. CSP [Appendix F](#)

**Resources:** > Local M.E. Director, WFG-FAM, Company Construction Safety, CPS, Contractor

#### Methodology:

- > The Company Engineer completes Task 4.3 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Company Engineer reviews (and accepts if complete) Contractor's Job-Site Safety Plan in accordance with template provided. Company Engineer ensures that Contractor's employee

orientation is comprehensive in nature and includes the subject matter that:

- (a) was provided by the Owner to Contractor management in the bidder's orientation,
- (b) was reviewed in the pre-bid and bid clarification meetings per the requirements of the PMP and
- (c) is consistent with Contractor's own specific procedures.

Note: if unacceptable, Contractor must resubmit in order for initial work to commence.

- > Company Engineer reviews Contractor's preliminary list of pre-task plans and ensures these are tied to schedule.
- > Company Engineer reviews safety elements from pre-bid and bid clarification checklist with Contractor supervision.
- > Company Engineer reviews Contractor's Information Manual
- > Company Engineer reviews Company Site Visitor Safety Protocol with Contractor management.

Note: Site Project Manager must develop for "Greenfield" site.

- > Company Engineer reviews pre-task plan for initial construction (according to methodology described in Task 5.1).
- > On sites that employ a Site Project Manager, Company Engineer submits Contractor's Job-Site Safety Plan to Site Project Manager for final acceptance.

**Step #4 and RASI Chart  
Roles**

**R = Responsibility**

**A = Approval**

**S= Support**

**I = Informed**

**Step #4: Prepare to Initiate Construction**

<b>Step 4</b>	<b>Who/What</b>	<b>Company Engineer</b>	<b>Engineering Manager</b>	<b>Director of Capital Projects</b>	<b>Company Construction Safety</b>	<b>Plant Safety</b>	<b>Site ME Director/WFG FAM</b>	<b>CPS (If Applicable)</b>	<b>Contractor/Bidder</b>	<b>GLOBAL PURCHASING</b>	<b>WFG Prequal Team</b>	<b>Corporate Risk Management</b>	<b>PMIM</b>	<b>Site Project Manager</b>	<b>Company2Work Administrator</b>
<b>4.1</b>	Review Owner's Job-Site Safety Organization with the Contractor	R	I		S	I	S	S	I					S	
<b>4.2</b>	Review Contractors Job-Site Safety Organization	R	I		S	I	I	S	S/I					I	
<b>4.3</b>	Review and accept Contractor's Job-Site Safety Plan and preliminary list of pre-task plans at pre-construction meeting; review details of site-specific safety related Special Conditions with Contractor	R	I		S	I	I	S	S					I	

**Key Deliverables: Contractor safety preparations completed prior to construction initiation.**

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.1  
**Task Name:** > Review Pre-Task Plans  
**Task Owner:** > Company Engineer  
**Task Description:** > Review Contractor's pre-task plans  
**Deliverables:** > Reviewed pre-task plan  
**Customer for Deliverables:** > Company Employees, Contractor

#### Necessary Inputs:

1. Project Management Process
2. Pre-task planning template (completed)
3. Review by Contractor's designated representative (competent/qualified person).
4. Pre-task Plan Memory Jogger

#### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. Contractor Supervisor
3. Contractor's designated representatives
4. <<URL>>

- Resources:** > Company Construction Safety, Local M.E. Director or WFG-FAM, CPS, Contractor

#### Methodology:

- > The Company Engineer completes Task 5.1 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Company Engineer requires Contractor to submit pre-task plans in accordance with the template provided in the Special Safety Conditions.
- > Company Engineer establishes timing requirements for submittal and review of Contractor's pre-task plans.

Note: The Pre-Task Plan Memory Jogger is a tool that aids the Company Engineer in understanding hazards and their control measures associated with a work task.

- > In the event that Contractor's work could impact Owner's workforce or operations, Company Engineer engages M.E. Director or WFG-FAM in final review of pre-task plan. (This will especially be the case where work is performed in proximity to the local workforce.)

Note: The respective roles of the Company Engineer and the M.E. Director or WFG-FAM are as follows:

- Company Engineer –administer contract documents
- M.E. Director/WFG-FAM – protect Company employees and Company facilities

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.2
- Task Name:** > Monitor Contractor Adherence to its Job-Site Safety Plan Discipline Process
- Task Owner:** > Company Engineer
- Task Description:** > Monitor Contractor adherence to its Job-site Safety Plan discipline process
- Deliverables:** > Effective Contractor's enforcement of their disciplinary process
- Customer for Deliverables:** > Company Engineer, Contractor

#### Necessary Inputs:

1. Project Management Process
2. Written Record of disciplinary action
3. Personal Observations
4. Name of Contractor's Key Executive

#### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. Contractor's Safety Book
3. Company Engineer
4. *Contractor's Job Site Safety Construction Regional Requirements United States*

*Construction Regional Requirements Canada (Link to Canadian Job-Site Safety Plan)*

5. Contractor's Job-Site Safety Plan

5. Contractor

**Resources:** > Other Owner's Field Supervision, Including CPS (If Available), Contractor

#### Methodology:

- > The Company Engineer completes Task 5.2 of the Construction Safety Process during Task 6.3 of Project Management Process.

Note: Personal observations of Contractor's employee compliance with safety requirements are a good indication of the Contractor's discipline enforcement.

- > The Company Engineer reviews the Contractor's records for detailed written reports on the instances where they have issued disciplinary action. The Company Engineer verifies that discipline has been consistent with process that Contractor has described in its Job-Site Safety Plan.

Note: The Contractor is responsible for imposing its discipline process.

- > In the event that the Contractor's Safety Book does not reflect enforcement emphasis that is consistent with the Company Engineer's own observations, the Company Engineer requires the Contractor to submit a corrective action plan.
- > In the event that the Contractor's current supervision fails to effect corrective measures the Company Engineer contacts the Contractor's key executive and requests a meeting to establish corrective measures. Company Engineer is to inform GLOBAL PURCHASING of such occurrences.

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.3 Construction Regional Requirements United States
- Task Name:** > Execute Plan for Awards, Promotions and Awareness
- Task Owner:** > Site Project Manager
- Task Description:** > Recognize Contractor Performance
- Deliverables:** > Implement Awards, Promotions, and Awareness,
- Customer for Deliverables:** > Company Project Team, Contractor Management, Contractor Employees

#### Necessary Inputs:

1. Project Management Process
2. Elements selected from Template of Project Awards, Recognition, Promotions and Awareness in Task 1.11
3. Evaluations by Company Engineers
4. Completed Contractors Construction Monthly Safety Report

#### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. CSP [Appendix D](#)
3. Company Engineers
4. Contractor

**Resources:** > Company Site Engineers CPS Personnel (if available), Contractor

#### Methodology:

- > The Company Engineer completes Task 5.3 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > **Promotions** - The Site Project Manager ensures that the promotions that were planned in Task 1.11 are executed according to the schedule. The Site Project Manager notifies and enlists the support of the Company project team beforehand.
- > **Performance Feedback** - The Site Project Manager provides monthly feedback to all prime Contractors on safety performance. These should be openly displayed at the job-site on Company Project Management Safety Bulletin Board(s).
- > **Award events** - Award events are the result of achieved goals related to the elements selected from the Template of Project Awards, Promotions and Awareness in Task 1.11. Enlist the support of Company Site Engineers and the CPS, if present, to execute. Award events may (and should be where earned) executed several times over the course of a project, particularly if of a long duration.

Note: Company Engineer performs this task on sites that do not employ a Site Project Manager.

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.4
- Task Name:** > Collect and Publish Data for Performance Management
- Task Owner:** > Site Project Manager
- Task Description:** > Collect Construction Contractor's Monthly Safety Reports from Company Engineers to use for publishing local reports which will be used by Company Engineers to track Contractor performance and to serve other management-published reports
- Deliverables:** > Published local reports that assist the project team in identifying performances of Contractors, subcontractors, and business units represented at the site. Published performances are to be used for positive recognition and as a basis for corrective action measures. Performance metrics are recordable incident rate Total Recordable Incident Rate (R-IR), Days Away Incident Rate (DA-IR) and Restricted/Transferred Incident Rate (DART-IR), death, and instances of serious near-miss injury.
- Customer for Deliverables:** > Local Project Team, Company Management, Contractors

#### Necessary Inputs:

1. Project Management Process
2. Completed "Construction Contractor's Monthly Safety Report" Construction Regional Requirements United States

#### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. Company Engineer

- Resources:** > Company Construction Safety, CPS, Company Engineer, Contractor

#### Methodology:

- > The Company Engineer completes Task 5.4 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Site Project Manager collects on the 10th of each month "Construction Contractor's Monthly Safety Report" from Company Engineers (who have previously solicited reports from each prime Contractor for prior month's activity).

Note: Company Engineer maintains a file of "Construction Contractor's Monthly Safety Reports" for each prime Contractor for incorporation into the Contractor's Final Evaluation form that is submitted to GLOBAL PURCHASING at contract closeout.

- > The Site Project Manager publishes reports for local site management. Incorporating

metrics of R-IR, DA-IR, DART-IR, instances of death and serious near-miss injury, the following reports are published monthly for 12-month rolling average period:

- Site aggregate performance of all Contractors
  - For each business unit represented at the site, the aggregate performance of Contractors employed by that business unit.
- > In addition, the Site Project Manager publishes monthly a 12-month rolling average report ranking all prime Contractors represented at the site and first tier subcontractors by highest (worst) to lowest (best) R-IR, DA-IR, DART-IR, instances of death and serious near-miss injury data shall be displayed for each respective Contractor.
- > Site Project Manager provides reports to senior management as required.
- > On sites that do not employ a Site Project Manager, Company Engineer provides reports to senior management in format required by local business unit.

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.5
- Task Name:** > Ensure Safety issues are reviewed at Contractor's Project Meetings
- Task Owner:** > Company Engineer
- Task Description:** > Company Engineer verifies that Contractor has reviewed safety issues
- Deliverables:** > Contractor's written record of:
- all injuries or incidents (or near miss for each) during the past week
  - progress towards hazard control measures identified in pre-task plans including any problems experienced
  - reviews of any inspection and/or citation from outside authority
  - presentation of upcoming planned work that has the likelihood to impact the safety of the Owner's employees or those of other Contractors
  - any other safety concerns
- Customer for Deliverables:** > Owner's Separate Contractors (if required by Owner), Subcontractors, CPS (if any)

#### Necessary Inputs:

1. Project Management Process
2. Safety Issues
3. Completed "Contractor's Incident Investigation Report"
4. Pre-task Plans
5. Outside Inspection and/or Citation

#### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. Various
3. Contractor
4. Contractor
5. Local, State or Federal Authorities

- Resources:** > Site Project Manager, Company Construction Safety  
CPS, Contractor

#### Methodology:

Note: At least weekly, the Contractor is required to discuss safety matters with its subcontractors and the Owner's Representative. United States Construction Regional Requirements

This discussion may be a meeting with only those parties or discussed as an agenda item on any one of several project meetings.

- United States – Construction Regional Requirements
- Company1638 08/02 Appendix A Section 1.1 Project Meetings

- Company1638 05/05
- Canada Construction Regional Requirements
  - Company1638 (Canada 11.02) Construction General Requirements Section 1.1 Project Meetings
- required by Company1638 (08 /02) Appendix A, Section 1.1 (which may include other parties). The methodology that follows applies to either ..  
(08-02)
  - The Contractor is responsible for both conducting the meeting and publishing minutes.

- > Company Engineer completes Task 5.5 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Company Engineer establishes a weekly time with the contractor when safety issues will be discussed with all subcontractors and the Company Engineer.
- > Company Engineer attends Contractor's project meeting to ensure that safety-related deliverables listed above are addressed
- > (Reference:
- > United States Construction Regional Requirements Company1638 (08-02), Article 9.10 or Company 1638A,(08/02) Article 2.10.) Company 1638 (05/05) Article 9.10

Canada Construction Regional Requirements  
Company1638 (Canada) (11/02) Article 9.11

- > Company Engineer requires within twenty-four (24) hours of project meeting contractor's written record of safety discussion items.
  - > Company Engineer advises Contractor of any recent revisions to Contractor's Information Manual.
  - > Company Engineer forwards copy of completed "Contractor's Incident Investigation Report" form to ESIS coordinator at
-

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.6
- Task Name:** > Monitor Performance of Contractors through Safety Walks
- Task Owner:** > Company Engineer
- Task Description:** > Company Engineer routinely joins the Contractor's weekly Health & Safety walk to ensure adherence to on-site safety requirements
- Deliverables:** > Safe Working Environment
- Customer for Deliverables:** > Contractors

#### Necessary Inputs:

1. Project Management Process
2. Contractor's weekly H&S inspection
3. Contractor's Job-Site Safety Organization
4. Current Pre-Task Plan
5. "Company Engineer's Safety Walk Around with Contractor Management"

#### Source of Input:

1. Task 6.3 Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. Contractor
3. Contractor
4. Contractor
5. CSP [Appendix H](#)

- Resources:** > Company Construction Safety, Site Project Manager, Contractor, CPS

#### Methodology:

- > The Company Engineer completes Task 5.6 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Company Engineer routinely joins Contractor on a Safety Walk and engages the Contractor with the following activities:
  - Company Engineer reviews Contractor's required written records of daily monitoring and weekly inspections and confirms Contractor's correlative corrective action plans for deficiencies are in place.
  - Company Engineer reviews the procedures that the Contractor has in place to assure the effectiveness of its Job-Site Safety Plan. Company Engineer focuses on the process the Contractor has implemented to address discrepancies, and not merely the discrepancy itself.  
example: good housekeeping is achieved by adequate procedures being in place - not by wall-to-wall sweeps when housekeeping is out of control.
  - Company Engineer requests review with Contractor of at least one current pre-task plan. Company Engineer confirms the following:
    - Pre-task plan accurately reflects field operation.
    - Contractor's employees are knowledgeable of the plan.
- > Company Engineer confirms Contractor's designated representative(s) for the work being

performed is present, and that the Contractor's Job-Site Safety Organization is complete and up-to-date.

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.7
- Task Name:** > Conduct Safety Book Reviews
- Task Owner:** > Company Engineer
- Task Description:** > Company Engineer to conduct Safety Book Review with Contractor to ensure documentation is up-to-date and accurate
- Deliverables:** > Comprehensive Safety Book
- Customer for Deliverables:** > Contractor's Employees, Owner

#### Necessary Inputs:

1. Project Management Process
2. Safety Book

#### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. Contractor

**Resources:** > Company Construction Safety, CPS, Contractor

#### Methodology:

- > The Company Engineer completes Task 5.7 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > At an early stage in the project, the Company Engineer reviews the Contractor's Safety Book for completeness. Periodically, throughout the duration of the project, audit its contents.
- > Company Engineer assesses whether deficiencies exist in the Contractor's Safety Book, and obtains action plan from the Contractor to address deficiencies.
- > Company Engineer ensures that the Contractor has addressed the following:
  - Health and Safety records regarding the Contractor's work that are required by the contract documents
  - Current Special Safety Conditions
  - Contractor's Job-Site Safety Organization Chart
  - Contractor's record of safety orientations,
  - Contractor's record of safety meetings a) held with Subcontractors and b) held with his own employees
  - Safety-related information from project meetings
  - Job-Site Safety Plan
  - Accident/injury and near miss reports
  - Written record of reprimand and disciplinary procedures, certificates of insurance, other miscellaneous reports related to complaints, concerns, etc.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 5.8 United States Regional Requirements
- Task Name:** > Monitor Drug-Alcohol Screening Program Outside the State of Michigan
- Task Owner:** > Site Project Manager
- Task Description:** > Verify that all elements of the drug-screening program are being properly administered.
- Deliverables:** > Evidentiary documentation to verify that all Contractor employees designated in the Special Conditions and who are employed at the job site have been tested and are confirmed to be in compliance.
- Customer for Deliverables:** > Company Engineer, Contractor

### Necessary Inputs:

1. Project Management Process
2. Drug-screening status
3. Special Condition for drug-alcohol screening (if adopted)

### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. for outside of Michigan and within Continental US: local drug-alcohol screening resource (or [Company2Work Administrator](#) if covered by [Company2Work Administration](#))
3. Output of Task 1.9

**Resources:** > Company2Work Administrator, Company Engineer, Contractor

### Methodology:

- > The Company Engineer completes Task 5.8 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > The following methodologies apply:
  - For projects outside the State of Michigan and within Continental US and governed by Special Conditions (if adopted at Task 1.9)
- > Site Project Manager audits compliance to requirement that all Contractor employees designated in the Special Conditions are drug-screened at the time of orientation by the private enterprise hired at Task 1.9. The methodology for drug –alcohol screening should conform to that described in the Special Conditions and the Contractor’s Information Manual and must be recorded by the Company Engineer. A suitable record must include the date of the performed drug screen and a unified employee identifier. Site Project Manager requires the Contractor to remove from the project any employees testing positive.

Note: In the event the employee demands a retest, the employee must pay the cost.

- > Following a serious injury/incident or a serious near miss of an injury/incident (as defined

by Articles 9.12, 9.13 in Company 1638 (08/02) – Company Construction General Conditions or as defined by Article 2.12, 2.13, of Company 1638-A (08/02) or as defined by Article 9.12, 9.13 in Company 1638 (05/05)), if a provision or post incident drug testing is included in the Special Conditions the Company Engineer will require the appropriate Contractor employees to undergo a post-incident drug test.

- > For Drug-Alcohol screening programs administered by Company2Work the Company Engineer monitors compliance as described in methodology for safety hazard awareness projects (reference Task 5.9), or as may be provided for by the Company2Work Administrator.
- > Company Engineer advises buyer if Contractor fails to become compliant with drug/alcohol screening program in Special Conditions.

NOTE: Employee refusal to post-incident test is cause for automatic dismissal (Unless prohibited by the drug/alcohol screening program.)

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 5.9 United States Construction Regional Requirements
- Task Name:** > Monitor compliance with the safety hazard awareness training and the drug/alcohol screening program requirements per Special Safety Conditions (Michigan only)
- Task Owner:** > Company Engineer
- Task Description:** > Ensure Contractor has employed only those employees who are up-to-date in with the safety hazard awareness training and the drug/alcohol screening program
- Deliverables:** > Contractor's "Project Readiness Report"
- Customer for Deliverables:** > Company Engineer

### Necessary Inputs:

1. Project Management Process
2. Special Safety Condition for the safety hazard awareness training and the drug/alcohol screening program
3. Contractor's Project Readiness Report
4. Employee Report Card

### Source of Input:

1. Task 6.3 - Facilitate Installation/Construction of Infrastructure, Buildings and M&E – [PMP Task 6.3](#)
2. [MI MUST](#)
3. Contractor
4. Contractor

**Resources:** > Company Construction Safety, Contractor, CPS

### Methodology:

- > The Company Engineer completes Task 5.9 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Company Engineer ensures that Contractor has submitted the Contractor's "Project Readiness Report". This report is required monthly and must include every employee of that Contractor who is working at the job-site.
- > Company Engineer reviews the Contractor's "Project Readiness Report" and performs a "sense-check" comparison of the number of employees listed on the report to those employees at the job-site. If there is a significant difference, it may indicate an outdated list and Company Engineer must challenge Contractor for proof of accuracy.  
Note: The Contractor's "Project Readiness Report" is the basis for random drug screening. A name absent from the list means that employee cannot be located for a random drug/alcohol screening.
- > Company Engineer may perform spot check by randomly selecting employee names from badge issue list, etc. and soliciting "Employee Report Card" from Contractor.
- > Company Engineer requires Contractor to take remedial action (e.g. training plan, dismissal of employee, etc.) for all employees not meeting with the safety hazard awareness training

and the drug/alcohol screening program requirements.

Company Engineer advises GLOBAL PURCHASING buyer if Contractor fails to become compliant with the safety hazard awareness training and the drug/alcohol screening program requirements

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.10
- Task Name:** > Review Contractor Serious Incident/Injury or near-miss of serious injury/incident (Ref Article 9.12 & 9.13 Company 1638, Article 2, Company 1638-A Article 2.12 & 2.13)
- Task Owner:** > Company Engineer
- Task Description:** > Company Engineer to review Contractor's serious injury/near miss reports and determine whether or not corrective action taken by Contractor is sufficient to eliminate unsafe conditions that led to incident
- Deliverables:**
- > Incident investigation and corrective actions taken by contractor that prevents recurrence of similar incident
  - > Notify ESIS-Company Claims coordinator
- Customer for Deliverables:** > Company Management, Site Management, ESIS Company Claims Coordinator

#### Necessary Inputs:

1. Project Management Process
2. Completed Contractor's Incident Investigation Report Form

#### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. Contractor

**Resources:** > Site Project Manager, Company Construction Safety, Contractor, GLOBAL PURCHASING

#### Methodology:

- > The Company Engineer completes Task 5.10 of the Construction Safety Process during Task 6.3 of Project Management Process.

Note: Contractor is required to immediately notify Owner upon the occasion of a serious incident or near miss of a serious incident, investigate the incident, make needed corrections, and submit a detailed, written report to Owner describing the Contractor's findings and the subsequent corrective actions taken.

- > Upon notification, Company Engineer makes immediate assessment of conditions. Company Engineer immediately stops any and all Contractor activities that Company Engineer assesses are being performed in a manner that presents an immediate danger of death or serious injury.
- > Prior to work resumption Company Engineer requires resubmission of any and all relevant pre-task plans for Company Engineer's review to ensure all plans incorporate appropriate corrective action measures.
- > Company Engineer reviews for completeness Contractor's written report (required within 24

hours) with Contractor to make sure corrective action taken by Contractor eliminates the unsafe conditions that led to the incident or near miss.

Note: For Michigan, ensure Contractor has attached copy of "Employee Report Card" for each involved employee.

- > Company Engineer reviews Contractor's Safety Book to confirm that records exist (a) of the corrective actions taken in response to the incident, and (b) of the review that was performed with the Contractor's own employees and subcontractors.
  - > In the event of repeated serious injury, serious near-miss incidents or sustained high recordable incident rates, Company Engineer requires meeting with Contractor key executive (listed on Job-Site Safety Plan) and local Contractor supervision to involve key executive in forming Contractor's corrective action plan. For all such meetings, the Company Engineer apprises GLOBAL PURCHASING beforehand to provide opportunity for GLOBAL PURCHASING to participate in such discussions and/or take other measures deemed to be appropriate.
  - > Company Engineer forwards copy of completed "Contractor's Incident Investigation Report" form to ESIS coordinator at .
-

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 5.11
- Task Name:** > Provide serious injury/incident or near-miss of serious injury/incident to Company Management
- Task Owner:** > Company Engineer
- Task Description:** > Company Engineer to forward Contractor's report of serious injury/incident or near-miss of serious injury/incident reports to Company Management as depicted in "Serious Injury and Near Miss Notification Process" flowchart
- Deliverables:** > Streamlined notification process that clearly and quickly disseminates relevant safety information to the entire Company organization
- Customer for Deliverables:** > Company Management, Company Employees

#### Necessary Inputs:

1. Project Management Process
2. Completed Contractor's Investigation Report Form
3. Serious Injury and Near Miss Notification Process Flowchart

#### Source of Input:

1. Task 6.3 Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. Contractor
3. CSP [Appendix J](#)

- Resources:** > Site Project Manager, Company Construction Safety, CPS

#### Methodology:

- > The Company Engineer completes Task 5.11 of the Construction Safety Process during Task 6.3 of Project Management Process.
  - > Following notification by Contractor of any instance of:
    - amputation
    - an occupational fatality
    - an on-site non-occupational death
    - an ambulance summoned to the job-site
    - hospitalization, or
    - Near-miss that could have resulted in death, amputation or hospitalization
- Canada Construction Regional Requirements
- critical injury

Note: The above categories comprise a subset of the Contractor's Incident Investigation

Reports that are required by Task 5.10.

- > The Company Engineer sends VME describing occurrence to Site Project Manager who appends any additional information on the impact to the site and sends this VME to the "Calling Tree Contacts" (see CSP Appendix J) by shifts end or within no longer than eight (8) hours.
- > Company Engineer acquires Contractor's written report in which the latter provides suspected root cause analysis and corrective action measures. (Due within twenty-four (24) hours of incident).
- > Refer to Task 5.10 – Review Contractor Serious Incident/Injury or Near-Miss of Serious Incident/Injury (Ref Article 9.12 and 9.13 Company 1638 or Article 2, Company1638A Article 2.12 and 2.13).
- > Company Engineer submits Contractor's preliminary written report to Site Project Manager who accepts initial written report and sends to "Calling Tree Contacts" (due within twenty-four (24) hours).
- > Company Engineer provides "draft" of Contractor's final comprehensive written report describing suspected contributing factors, root cause analysis, and corrective measures taken to Site Project Manager who accepts final written report and sends to "Calling Tree Contacts".
- > In addition to the VME and completed "Contractor's Incident Investigation Report" form that the ESIS Company Claims coordinator is to receive as a member of the "calling tree", the Company Engineer is to page the ESIS Company Claims coordinator as early as possible.
- > At a "Brownfield" site, the Plant Safety Review Board may request a review of any serious injury/incident or near miss of serious injury/incidents. The Company Engineer utilizes the "Contractor's Incident Investigation Report" form as a basis for such reviews.

United States Construction Regional Requirements

Note: The WFG Construction Safety Administrator can provide counseling in the event of an impending OSHA compliance visit.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 5.12 United States Construction Regional Requirements
- Task Name:** > Follow-up on Corporate Risk Management Project Assessment Reports' recommendations
- Task Owner:** > Site Project Manager
- Task Description:** > Assign corrective actions to key assessment areas highlighted by the CRM Project Assessment Report.

Note: Applies to OCIP jobs only.

- Deliverables:** > Implemented Corrective Actions
- Customer for Deliverables:** > Site Project Team, Contractors, CRM (Corporate Risk Management), Engineering Manager

### Necessary Inputs:

1. Project Management Process
2. CRM Project Assessment Report

### Source of Input:

1. Task 6.3 Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. CRM Assessor

- Resources:** > Company Construction Safety, CRM Assessor, Company Engineers, CPS

### Methodology:

- > Company engineer completes Task 5.12 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Site Project Manager will receive notification from CRM of impending assessment. Site Project Manager ensures project team's resources are available for visit.
- > Site Project Manager upon receipt of verbal (and subsequent written report) prepares corrective action plans collaborating where necessary with Company Engineers.
- > Site Project Manager provides summary of corrective action plans to site project team members, CRM, and Engineering Manager for follow-up.

# CONSTRUCTION SAFETY PROCESS

## Statement of Work

- Task Number:** > 5.13
- Task Name:** > Encourage Contractors to Track Leading Indicators
- Task Owner:** > Company Engineer
- Task Description:** > Processes that are linked to accident prevention are identified, measured, and regularly reviewed by management and employees
- Deliverables:** > “Run” charts of identified key leading indicators of safe conditions
- Customer for Deliverables:** > Company Engineer, Contractors, Contractors’ employees

### Necessary Inputs:

1. Project Management Process
2. Leading Indicators

### Source of Input:

1. Task 6.3 – Facilitate Installation/Construction of Infrastructure, Buildings and M&E [PMP Task 6.3](#)
2. [CSP Appendix I](#)

**Resources:** > Company Construction Safety, CPS

### Methodology:

- > The Company Engineer completes Task 5.13 of the Construction Safety Process during Task 6.3 of Project Management Process.
- > Because the process of tracking leading indicators requires the support of the entire Job-Site Safety Organization in order for it to be effective, the Company Engineer (or in the case of a large project, a Site Project Manager) must lead the promotion of such efforts. The role of the Company Engineer is to facilitate the tracking of leading indicators. Contractors, themselves, must be committed to gaining continuous safety improvement by selecting the leading indicator to be tracked, communicating these, and gaining the involvement of their own employees.
- > Company Engineer provides counsel to Contractors in selecting leading indicators to be tracked. All must be measurable. Contractor employee involvement in the measurement of process is a key enabler to success.
- > Company Engineer exhibits Company Management’s commitment to safety by reviewing the contractor’s leading indicator “run” charts at Owner Representatives Weekly Project Meetings, or at other regular opportunities or intervals where Company Management’s commitment can be observed.

**Step #5 and RASI Chart  
Roles**

**R = Responsibility**

**A = Approval**

**S= Support**

**I = Informed**

**Step #5: Monitor Contractor Safety Performance During Construction Phase**

<b>Step 5</b>	<b>Who/What</b>	<b>Company Engineer</b>	<b>Engineering Manager</b>	<b>Director of Capital Projects</b>	<b>Company Construction Safety</b>	<b>Plant Safety</b>	<b>Site ME Director/WFG FAM</b>	<b>CPS (If Applicable)</b>	<b>Contractor/Bidder</b>	<b>GLOBAL PURCHASING</b>	<b>WFG Prequal Team</b>	<b>Corporate Risk Management</b>	<b>PMM</b>	<b>Site Project Manager</b>	<b>Company2Work Administrator</b>
5.1	Review Pre-Task Plans	R						S/I	S	S/I					
5.2	Monitor Contractor Adherence to its Job-Site Safety Plan Discipline Process	R					I	S	S/I						
5.3	Execute Plan for Awards, Promotions and Awareness	S/I					I	S	S					R	
5.4	Collect and Publish Data for Performance Measurement	S	I	I	I		I	S	S	I		I	I	R	
5.5	Ensure Safety issues are reviewed at Contractors Project Meetings	R	I			I	I	S	S					S/I	
5.6	Monitor Performance of Contractors through Safety Walks	R	S					S	S						
5.7	Conduct Safety Book Reviews	R						S	S						
5.8	Monitor Drug-Alcohol Screening Program	S	S					S	S/I					R	S
5.9	Monitor compliance with the safety hazard awareness training and the drug/alcohol screening program requirements per Special Safety Conditions (Michigan only)	R	I					S	S					I	S
5.10	Review Contractor Serious Incident/Injury or near-miss of serious injury/incident (Ref Article 9.12 & 9.13)	R	I	I	I		I	S	S					S	
5.11	Provide serious injury/incident or near-miss of serious injury/incident to Company Management	R	I	I				S						S/I	
5.12	Follow-up on Corporate Risk Management Project Assessment Reports` recommendations	S/I	I	I	S		I	S				S/I		R	
5.13	Encourage Contractors to Track Leading Indicators	R			S	I	I	S	S					S	

**Key Deliverables: Oversight of Contractor's safe execution of the work**

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 6.1  
**Task Name:** > Perform Post Contract Evaluation  
**Task Owner:** > Company Engineer  
**Task Description:** > Document Contractor safety performance for purchase order  
**Deliverables:** > Comprehensive contract evaluation  
**Customer for Deliverables:** > GLOBAL PURCHASING

#### Necessary Inputs:

1. Project Management Process
2. Relevant project data
3. Contractor's Final Evaluation Form
4. Completed Construction Contractor's Monthly Safety Report

#### Source of Input:

1. Task 8.3 – Project Management Process [\*PMP Task 8.3\*](#)
2. Contract Files
3. PMP Forms/Procedures Index
4. Contractor

- Resources:** > Local M.E. Director, WFG-FAM, Site Project Manager, CPS, Engineering Manager, other Company Engineers

#### Methodology:

- > The Company Engineer completes Task 6.1 of the Construction Safety Process during Task 8.3 of Project Management Process.
- > As part of the Company Engineer's formal closeout meeting with the project stakeholders, the Company Engineer completes the Contractor's Final Evaluation Form including Contractor's Safety Performance.
- > The Company Engineer forwards the completed form to GLOBAL PURCHASING and to other parties listed in the PMP Task 8.3.

## CONSTRUCTION SAFETY PROCESS

### Statement of Work

- Task Number:** > 6.2
- Task Name:** > Document Lessons Learned
- Task Owner:** > Company Engineer
- Task Description:** > Company Engineer to document lessons learned
- Deliverables:** > Comprehensive list of successes and failures associated with contract
- Customer for Deliverables:** > Construction Safety Users Group (CSUG), GLOBAL PURCHASING

#### Necessary Inputs:

1. Project Management Process
2. Injury Reports
3. Corrective Action Plan Reports
4. Project Notes
5. Meeting Minutes
6. Leading Indicator

#### Source of Input:

1. Task 8.3 – Project Management Process [PMP Task 8.3](#)
2. Project Files
3. Project Files
4. Project Files
5. Project Files
6. Project Files

- Resources:** > Engineering Manager, Company Engineers, CPS, local M.E. Director, WFG-FAM, local site safety supervisor, Contractors and subcontractors

#### Methodology:

- > The Company Engineer completes Task 6.2 of the Construction Safety Process during Task 8.3 of Project Management Process.
- > Company Engineer draws upon Resources listed above and submits Lessons Learned to the Company common Global Lessons Learned (GLL) at <<URL>> and flags lesson as “Safety Lesson”.
- > Company Engineer follows up with Engineering Manager (or local Subject Matter Expert [SME] to ensure significant learning opportunities are submitted to Construction Safety User Group [CSUG]).

Note: Submissions of Lessons Learned are a PMP requirement for contract closeout. They may be submitted beforehand to expedite incorporation of Lessons Learned into future work.

Note: The CSUG periodically reviews submitted learning opportunities, and proffers any number of actions for the approval of the Construction Safety Steering Council (CSSC): - New Special Safety Conditions, new Contractor Information, recommended process change to CSP, no action recommended.

**Step #6 and RASI Chart**  
**Roles**

R = Responsibility

A = Approval

S= Support

I = Informed

**Step #6: Close Out Project**

	Who/What	Company Engineer	Engineering Manager	Director of Capital Projects	Company Construction Safety	Plant Safety	Site ME Director/WFG FAM	CPS (If Applicable)	Contractor/Bidder	GLOBAL PURCHASING	WFG Prequal Team	Corporate Risk Management	PMM	Site Project Manager	Company2Work Administrator
<b>Step 6</b>															
<b>6.1</b>	Perform Post Contract Evaluation	S	R					S		I	I				S
<b>6.2</b>	Document Lessons Learned	R	A		S	S	S	S				I	S		

**Key Deliverables:**      **Contractor performance evaluated**  
**Safety-related Lessons Learned documented**