Contractor Safety Management for Oil and Gas Drilling and Production Operations

API RECOMMENDED PRACTICE 76
FIRST EDITION, APRIL 2004

American Petroleum Institute

Helping You Get The Job Done Right.SM

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Upstream Segment

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FOREWORD

This recommended practice is under the jurisdiction of the American Petroleum Institute Upstream Department's Executive Committee on Drilling and Production Operations. It was developed with assistance from the International Association of Drilling Contractors (IADC), the Association of Energy Service Companies (AESC), the Offshore Operators Committee, and the National Ocean Industries Association (NOIA). The goal of this voluntary recommended practice is to assist the oil and gas industry in promoting Contractor safety in the exploration and the development of oil and gas. THE PUBLICATION DOES NOT, HOWEVER, PURPORT TO BE SO COMPREHENSIVE AS TO PRESENT ALL OF THE RECOMMENDED OPERATING PRACTICES THAT CAN AFFECT SAFETY IN OIL AND GAS DRILLING, WELL SERVICING AND PRODUCTION OPERATIONS.

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Suggested revisions are invited and should be submitted to API, Standards Department, 1220 L Street, NW, Washington, DC 20005.

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Contractor Safety Management for Oil and Gas Drilling and Production Operations

1 Introduction

1.1 SCOPE

This publication is intended to assist Operators, Contractors, and Subcontractors (Third Parties) in the implementation of a Contractor safety program and improve the overall safety performance while preserving the independent contractor relationship. It is intended for the Upstream segment of the petroleum industry; however, since the Operator requirements and the contracted work are diverse, this publication may not be applicable to all operations at each company or to all contract work performed in those operations.

Many oil and gas exploration and production companies contract for equipment and personnel services for a wide range of activities, including drilling, production, well servicing, equipment repair, maintenance, and construction. Certain activities of Contractors have the potential to place either Contractor and/or Operator personnel and/or equipment at risk. It is important that operations are carried out in a safe manner.

Operators and Contractors need to provide safe work places and to protect the safety of their workforces and the general public. When they work together to improve safety, both benefit.

1.1.1 Operator and Contractor Commitment to Improved Contractor Safety Performance

Both Operator and Contractor Management commitments are essential in minimizing accidents/incidents and preventing injuries and illnesses. Management commitment begins with the Operator and Contractor providing the resources necessary for implementing and maintaining an effective safety program.

The Operator's and Contractor's commitments and continued support is common to all successful safety programs in order to minimize incidents and prevent injuries and illnesses. Effective safety programs require the Operator and Contractor to:

- focus resources on safety; and
- review how Contractor safety is being addressed.

Operators may encourage Contractor management commitment by sharing information regarding effective safety performance benefits. To emphasize their commitment, many Operators incorporate the need for Contractor safety in senior management policy statements on safety, health and the environment.

1.1.2 Policy Statement

Management commitment may be expressed in a policy that establishes the importance of Operator and Contractor safety. Management's involvement helps ensure the effectiveness of a safety program. An example policy statement is detailed in Appendix D.

1.2 BENEFITS OF AN OPERATOR AND CONTRACTOR SAFETY PROGRAM

Operators and Contractors benefit when they work together to enhance the management of related safety programs. These benefits can include:

- Safety expectations and capabilities are clearly understood before the work begins;
- Improved safety performance;
- Better working relationship between Operator and Contractor;
- Improved safety training for both Operators and Contractors; and
- Improved productivity, reliability and efficiency.

1.3 THIRD PARTIES AND SUBCONTRACTORS

Frequently, Third Parties and Subcontractors are utilized to perform specialized portions of work assignments. A Third Party and/or Subcontractor should be subject to applicable elements of the Operator's and/or Contractor's safety program. The Operator and/or Contractor should make provisions for inspection of relevant Third Party/Subcontractor equipment.

2 Industry Standards and Practices

The most recent edition of the following publications are either referenced in this recommended practice or may be of use in the development of an Operator/Contractor Safety Program.

API

- Bull E1 *Generic Hazardous Chemical Category List and Inventory for the Oil and Gas Exploration and Production Industry*
- RP 2D *Operation and Maintenance of Offshore Cranes*
- Spec 4F *Drilling and Well Servicing Structures*
- RP 4G *Maintenance and Use of Drilling and Well Servicing Structures*
- RP 8B *Inspection, Maintenance, Repair, and Remanufacture of Hoisting Equipment*
- Spec 9A *Wire Rope*
- RP 9B *Application, Care, and Use of Wire Rope for Oil Field Service*
- RP 11ER *Guarding of Pumping Units*
- RP 11G *Installation and Lubrication of Pumping Units*
- RP 14J *Design and Hazards Analysis for Offshore Production Facilities*
- RP 49 *Drilling and Well Servicing Operations Involving Hydrogen Sulfide*
- RP 53 *Blowout Prevention Equipment Systems for Drilling Operations*
- RP 54 *Occupational Safety for Oil and Gas Well Drilling and Servicing Operations*
- RP 67 *Oilfield Explosives Safety*
- RP 70 *Security for Offshore Oil and Natural Gas Production Operations*
- RP 74 *Occupational Safety for Onshore Oil and Gas Production Operations*
- RP 75 *Development of a Safety and Environmental Management Program for Offshore Operations and Facilities*
- RP 500 *Classification of Locations for Electrical Installations at Petroleum Facilities Classified as Class I, Division 1 and Division 2*
- RP 505 *Classification of Locations for Electrical Installations at Petroleum Facilities Classified as Class 1, Zone 0, Zone 1, and Zone 2*

Introduction to Oil and Gas Production

AESC[1]

Recommended Safe Procedures and Guidelines for Oil & Gas Well Servicing
Hazardous Communication Compliance Guide for the Well Service Industry
DOT Drug Testing Compliance Guide
Rig Safety Inspection Forms
5 Minute on the Job Safety Talks
AESC Accident Investigation Kit

ANSI[2]

- Z41 *Personal Protection—Protective Footwear*
- Z49.1 *Safety in Welding and Cutting and Allied Processes* (AWS Z49.1)
- Z87.1 *Practice for Occupational and Educational Eye and Face Protection*
- Z88.2 *Respiratory Protection*
- Z89.1 *Requirements for Industrial Head Protection*
- Z359.1 *Safety Requirements for Personal Fall Arrest Systems, Subsystems and Components*

IADC[3]

Drilling Manual
Drilling Technology for the Man on the Rig
Drilling Technology Series
Health, Safety and Environment Reference Guide
Guía de Referencia Para Prevención de Accidentes
Weekly Safety Meeting Report
52 Safety Topics
Five Minute Rig Safety Meeting Topics
Guide to Safe Stairways, Walkways, and Railings
How to Keep Drugs off Your Rig
H_2S Safety Handbook
Planning for Drilling in H_2S Zones
Rotary Rig Safety Inspections Checklist
Rules-of-Thumb for the Man on the Rig
Safety Regulations for the Oil and Gas Industry
The Rotary Rig and its Components Poster
Home Study Courses: Rotary Drilling Series
Rig Pass: Accrediting the Basics
Guide to Blowout Prevention
Introduction to Well Control
Well Control for the Man on the Rig
The Pit Watcher
H_2S Safety in Drilling and Production
Makin' Hole: How Oilwells are Drilled
Roughneck Training
Tripping Practices
Safe Rigging Practices
Basic Rigging Concepts
Drums, Blocks, Sheaves, and Wire Rope Terminations
Rigging Gear and Inspection Criteria
Safe Rigging Practices and Procedures
Putting Slings to Work
WellCAP Accreditation Program
IADC Guidance for Packaging and Transportation of Cargo for U.S. Offshore Operations
IADC Security Principles for U.S. Offshore Operations

[1]Association of Energy Service Companies, 10200 Richmond Ave., #253; Houston, Texas 77042. www.aesc.net

[2]American National Standards Institute, 25 West 43rd Street, 4 Floor New York, New York 10036. www.ansi.org

[3]International Association of Drilling Contractors, P.O. Box 4287, Houston, Texas 77210. www.iadc.org.

3 Definitions

3.1 Contractor: An individual, partnership, firm, or corporation that is hired to do a specific job or service (such as a Drilling or Well Servicing Contractor) or to provide contract employees to an Operator or Contractor and is also the individual, partnership, firm, or corporation retained by the owner or Operator to perform other work or provide supplies or equipment.

3.2 critical equipment: Equipment and other systems determined to be essential in detecting or preventing the occurrence of or mitigating the consequences of an uncontrolled release. Such equipment may include pressure vessels, machinery, piping, blowout preventers, wellheads and related valving, flares, alarms, interlocks, fire protection equipment and other monitoring, control and response systems.

3.3 electrical classification of areas: For the purpose of this document, locations are classified according to API RP 500 or API RP 505.

3.4 facility: Wells, structures, living quarters, drilling and workover packages, process equipment, utilities, pipelines, and mobile offshore units.

3.5 hazard: Any act or condition that if not corrected or noticed could lead to personal injury, equipment damage or environmental consequences.

3.6 hazard analysis: The application of one or more methodologies that aid in identifying and evaluating hazards. Sources that may be helpful in performing hazards analysis include API RP 14J and API RP 74.

3.7 hazardous substance: Any substance that, by reason of being explosive, flammable, toxic, corrosive, oxidizing, irritating, or otherwise harmful, has the potential to cause injury, illness, or death.

3.8 Job Safety Analysis (JSA): A documented process in which the workers and possibly their supervisor systematically review the planned work, identify the hazards associated with that work, and implement safeguards to eliminate or mitigate those hazards prior to starting the work.

3.9 location: The point at which a well is to be drilled, serviced and/or produced from. Also referred to as "wellsite." It includes surrounding area used for storage and operation of ancillary equipment such as mud storage, tubing racks, erection of rigging equipment, maintenance areas, etc.

3.10 Operator: The individual, partnership, firm, or corporation having control or management of operations on the leased area or a portion thereof. The Operator may be a lessee, designated agent of the lessee(s), or holder of operating rights under an operating agreement.

3.11 permit to work system: A formal written system used to control certain types of work that are potentially hazardous.

3.12 PPE: Personal Protective Equipment.

3.13 process: The systems for production, use, storage, handling, treatment, or movement of hydrocarbons, sulfur, or other substances.

3.14 Standard Safety Questionnaire (SSQ): A standardized safety questionnaire to measure safety performance of contractors and Subcontractors.

3.15 Subcontractor: An individual, partnership, firm, or corporation that is hired by a Contractor.

3.16 supervisor: The person who has been given the control, direction, or supervision of work performed by one or more personnel.

3.17 Third Party: The individual, partnership, firm or corporation retained by the Operator to perform specialized services or to provide specialized equipment; does not include drilling or well servicing Contractors.

3.18 uncontrolled release: An accidental release of hydrocarbons, toxic substances, energy, or other materials that is likely to develop quickly, be outside the anticipated range of normal operations, present only limited opportunity for corrective action, require any action to be in the nature of an emergency response, and could result in serious environmental or safety consequences.

3.19 well servicing: Well work involving pulling or running tubulars or sucker rods, to include but not limited to redrilling, completing, recompleting, workover, and abandonment operations.

4 Operations-specific Safety Requirements

4.1 OPERATOR SAFETY REQUIREMENTS

After determining the type of work to be performed by a Contractor, the Operator should identify the safety requirements and communicate them to the Contractor. These safety requirements may be broad, or general in certain cases, or very specific in others, depending on the work assignment. Certain Contractors (such as those specializing in leak repair or working with radioactive sources) may have more experience and knowledge relevant to the hazards involved and should be consulted in order to establish mutually agreeable and relevant safety procedures.

4.2 CONTRACTOR SAFETY PROGRAMS AND PROCEDURES

Contractors should consider developing their own safety procedures or programs. In many cases, Contractors and Subcontractors are used because of their expertise, knowledge of anticipated hazards, and special safety requirements associated with the work. In these cases, a determination must be made as to which individual or company will have the primary responsibility for implementing additional safety requirements applicable to their specialty. These must be consistent with operational and regulatory requirements.

On jobs where multiple Contractors or Subcontractors are employed, there needs to be a coordinated effort to ensure a common understanding exists regarding safety procedures.

4.3 TRAINING AND COMMUNICATIONS

4.3.1 Training Requirements

Contractors have the responsibility to provide appropriate information and training to ensure that their employees have adequate knowledge and skills to perform their jobs safely. The Contractor is generally responsible for providing safety and job-specific training for its employees unless otherwise stated in the contract or other agreement. Upon final review of the scope of work, Operator and Contractor may identify any site or job-specific training that is necessary to perform the work safely and agree on how this will be accomplished. Additionally, other considerations include, but may not be limited to:

- Short Service Employee programs (SSE)—See Appendix B
- Industry Training Matrix—See Appendix C

4.3.2 Verification of Training

It is important for the Contractor to maintain records of training and make them available to the Operator upon request. The Contractor should consider periodically reviewing training schedules and materials to verify that they are current. The Contractor should maintain training documentation in a manner that is easily retrievable. Additionally, Contractor personnel may need to carry certain training credentials as required by regulation or the Operator.

4.3.3 Communicating Requirements

Operators and Contractors are responsible for communicating the appropriate information regarding workplace hazards and safety requirements to their employees. The communication of this information may include many formats such as an orientation program, JSAs, safety meetings, pre-job/pre-tour safety meetings, training, Material Safety Data Sheets, safe work permits, signs, posters, procedures, or other written materials.

4.3.4 Emergency Response, Drills/Exercises Requirements

It is generally the Contractor's responsibility to comply with the Operator's emergency response procedures and evacuation plans. Conversely, the Operator must comply with the Contractor's requirements when on the site of a Contractor's Mobile Offshore Drilling Unit (MODU) or other type of drilling or well servicing unit. Certain elements in the Operator's and/or Contractor's evacuation procedures may include designated assembly areas and/or evacuation routes, and the method of accounting for personnel during an incident.

Where applicable, all personnel should receive appropriate orientation and training in emergency procedures and participate in emergency drills and exercises. For emergency evacuations, muster locations should be identified for all personnel who will evacuate. Procedures should be in place to account for personnel, as applicable.

4.3.5 JSAs and Safety Meetings

Operators and Contractors may consider conducting Job Safety Analysis (JSAs), safety observations and regularly scheduled safety meetings to provide on-going training and communication of safety issues. Additionally, a safety awareness program may be beneficial. Subcontractors and other Third Parties should be required to attend all applicable safety meetings.

4.4 PERSONNEL NEW TO THE WORK SITE

All personnel new to the work site should be made aware of the job and specific site safety requirements, including emergency training, as applicable.

5 Contractor Selection Process

5.1 GENERAL

A major step in achieving acceptable Contractor safety performance is selecting a qualified and responsible Contractor. Therefore, it is appropriate for Operators to request that Contractors submit specific safety and training information in their contract response proposals. For example, such information might include:

a. A review of the Contractor's written safety and environmental policies and practices endorsed by the Contractor's top management.
b. A statement of commitment by the Contractor to comply with all applicable safety and environmental regulations and provisions of this publication.
c. Injury and illness experience for the previous 3 years.
d. An outline of the Contractor's initial employee safety orientation.
e. Descriptions of the Contractor's various safety programs, including: accident investigation procedures; how safety inspections are performed; safety meetings; substance abuse prevention (testing and/or search) programs.
f. Description of the training that each Contractor employee has received and the Contractor's programs for refresher training.
g. Description of the Contractor's short service employee (SSE) training program. Operator and Contractor should establish the SSE program as part of the overall contract Health Safety and Environment Management negotiation process.
h. Completion of a Safety Questionnaire or equivalent (see 5.3 and Appendix A).

5.2 BID PACKAGE

An Operator should inform a Contractor of its safety expectations by clearly outlining its safety performance requirements in one or more ways. One method, although not universally utilized, is a bid package. Such a bid package may define the safety standards the Contractor is expected to meet. Bid packages may not be practical for certain projects. The Operator may request specific safety information from the Contractor by other means.

5.3 SAFETY QUESTIONNAIRE

Operators and Contractors may utilize a safety questionnaire to determine whether a Contractor's safety qualifications are adequate for performing the involved scope of work. The primary purpose of a safety questionnaire is to obtain and evaluate information about a prospective Contractor. Two samples of safety questionnaires are provided in Appendix A.

A safety questionnaire prompts the Contractor to provide the majority of the necessary information for an Operator to complete an initial evaluation of the Contractor's safety performance and ability to comply with safety requirements. Major sections of a Safety Questionnaire and the purpose of each section may include:

a. *General*: Provides basic information on the Contractor including location and contacts.
b. *Organization*: Provides basic information such as services provided.
c. *Safety Performance*: Provides information on the Contractor's safety performance, such as incident statistics.
d. *Safety Programs and Procedures*: Identifies the Contractor's safety programs and policies and provides information on the Contractor's substance abuse testing program.
e. *Training*: Identifies the type of training given to Contractor employees and supervisors regarding safety and operational issues, specific to the operations involved.
f. *Safety Coordination*: Provides information on safety responsibility and support structure, and reporting relationships.

The Safety Questionnaire should be completed by Contractor personnel familiar with safety and training data.

5.4 OPERATOR REVIEW OF CONTRACTOR QUALIFICATIONS

The Operator should consider establishing a method of reviewing and determining whether a Contractor can meet the Operator's safety requirements and therefore be considered for work. An example process would be once a Safety Questionnaire has been completed by the Contractor, the Operator would review the document for completeness, and evaluate it against the Operator's requirements. In order to assist the Contractor, Operators would provide relevant feedback to the Contractor on areas that need enhancement or improvement.

6 Work Performance

6.1 RESPONSIBILITIES

It is important for the Operator and Contractor to understand their individual responsibilities during the planning, performance, and completion stages of work. As part of the process, the Operator may notify the Contractor where safety requirements are not being met, but it is generally the responsibility of the Contractor, not the Operator, to communicate to Contractor employees the steps that should be taken to correct any deficiencies.

6.2 SAFETY REQUIREMENTS

Before work is started, the Operator should identify and present to the Contractor relevant safety rules required by the Operator. All or part of this information may be used in the safety orientation and safety meetings by the Operator or the Contractor.

7 Management of Change

7.1 GENERAL

Managing change is critical to preventing incidents and controlling loss. The operator and contractor should have a management of change process that establishes procedures to identify and control hazards associated with change (see API RP 74 and API RP 75). The procedures should maintain the accuracy of safety information related to the change. On occasion, temporary repairs, connections, bypasses, or other modifications may be made out of operating necessity. Any of these changes can introduce new hazards or compromise the safeguards built into the original design. Care must be taken to understand the operational, and personnel safety and environmental implications of any changes. Although some changes may be minor with little likelihood of compromising safety or environmental protection, many changes may have the potential for disruption, injury, or business loss.

7.2 CHANGE IN FACILITIES

Change at drilling, well servicing and production sites arise whenever the operations or mechanical design is substantively altered. Change may also occur as a result of changes in produced fluids, well servicing fluids, drilling fluids, by-products or waste products, design inventories, instrumentation and control systems, or materials of construction. In many instances, these changes are deemed minor and do not require specific procedures. Typical instances in which change would likely occur include the following:

a. Construction of new production or process facilities.

b. New facility projects that involve production or process tie-ins to existing facilities, equipment reconfiguration, or modification of existing facilities/equipment.

c. Modification of existing facilities that result in changes to facility or equipment design, structural support, layout, or configuration.

d. Projects to increase facility throughput or accommodate different produced fluids.

e. Significant changes in operating conditions, including pressures, temperatures, flow rates, or process conditions different from those in the original process or mechanical design.

f. Equipment changes, including the addition of new equipment or modifications of existing equipment. These can include changes in alarms, instrumentation, and control schemes.

g. Modifications of the process or equipment that cause changes in the facility's pressure relief requirements. These can include increased process throughput, operation at higher temperatures or pressures, increased size of equipment, or the addition of equipment that might contribute to greater pressure relief requirements.

h. Bypass connections around equipment that is normally in service.

i. Operations outside the scope of current written operating procedures, including procedures for start-up, normal shutdown, and emergency shutdown.

j. Changes made in the mechanical design or in operating procedures that result from the completion of a hazards analysis.

k. Introduction of new or different chemicals (e.g., corrosion control agents, anti-foulants, anti-foam agents), drilling muds or workover/completion fluids.

l. Change in facilities may include mechanical changes that would not necessarily appear on a instrument diagram, including drilling and construction equipment and temporary connections or replaced components that are "not in kind," such as:

1. Replacement equipment or machinery that differs in specifications from the original equipment or previously approved modification.
2. Temporary piping, connections, pipe repairs, or hoses.
3. An alternate supply of materials, catalysts, or reactants.
4. Temporary electrical equipment or utility connections, other than for emergency situations.
5. Substantial changes to drilling diverter system design.
6. Substantial changes to blowout preventers (BOPs) configuration.
7. Substantial changes to top drives or other drilling systems.

7.3 CHANGE IN PERSONNEL

Change in personnel, including Contractor personnel, as appropriate, occurs whenever there is a change in the organization or in personnel that operate the facility. Routine personnel vacancies and replacements, rotation, and shift or tour changes are addressed in operating procedures, safe work practices, and training and should not require additional management of change action.

Organization changes, particularly those brought about by the acquisition or sale of a facility, may necessitate a thorough review of the safety and environmental management program. Upon acquisition or transfer of management control, a review should be conducted and acquired assets incorporated into the new organization's safety and environmental management program, as appropriate.

7.4 MANAGING THE CHANGE

The management program should establish and implement written procedures to manage change in facilities and personnel. These procedures should be flexible enough to accommodate both major and minor changes. Minor changes generally

do not require any specific procedures. Written procedures should cover the following:

a. The operations and mechanical design basis for the proposed change.

b. An analysis of the safety health, and environmental considerations involved in the proposed change, including, as appropriate, a hazards analysis. The effects of the proposed change on separate but unrelated facilities (i.e., structures/platforms, pipelines, equipment, emergency isolation and control systems and equipment, mitigative systems and equipment, accommodations areas, emergency evacuation and equipment) and on area-wide emergency plans (i.e., evacuation or oil spill) should also be reviewed.

c. Any necessary revisions of the operating procedures, safe work practices, and training program.

d. Communication of the proposed change and the consequences of that change to appropriate personnel.

e. Any necessary revisions of the safety and environmental information.

f. The duration of the change, if temporary.

g. Required authorizations to effect the change, if applicable.

8 Evaluating Contractor HSE Performance

8.1 GENERAL

The Operator and Contractor each have roles in monitoring and evaluating HSE performance.

8.2 SAFETY PERFORMANCE REPORTING

All occupational injuries, illnesses and property damage incidents associated with the on-site work should be reported to both the Contractor and Operator as soon as possible. Recording should be done in accordance with applicable requirements for occupational injuries and illnesses. The Contractor and Operator should identify the mechanism and persons to forward and receive reports as appropriate. This process should take into consideration efforts to ensure that reporting procedures adhere to relevant privacy requirements.

8.3 OPERATOR REVIEWS

The Operator should consider periodically reviewing the Contractor's safety programs, policies and procedures, including SSQ information, and request that they be updated when circumstances warrant a revision.

8.4 CONTRACTOR INSPECTIONS

Contractors should conduct periodic internal reviews, consistent with their procedures. The Operator may also perform an inspection or review of the Contractor's programs to verify compliance with applicable Operator safety requirements.

APPENDIX A—STANDARDIZED SAFETY QUESTIONNAIRE

Company: _____ Contact Person: _____

Facility or District Address: _____ Form Completed By: _____

Phone: _____

Geographic Area of Coverage: _____ Fax: _____

24-Hour Emergency Phone Number: _____ E-mail: _____

Federal Tax ID: _____

This Questionnaire was provided as a sample Standardized Safety Questionnaire (SSQ) and may be used by your *present and potential* customers to evaluate your training and Health, Safety and Environmental (HSE) systems. It has been modified to make it applicable to U.S. and International land and offshore operations.

Enclosure Checklist

Please ensure that the following is included with your submission package:

_____

_____

_____

I agree that the information is correct and true to my knowledge.

Name:_____ Date: _____

GENERAL SAFETY INFORMATION

1.What is/are your company's SIC/Class Code(s), if applicable?_____.

2a. Check (√) all the categories that describe the services your company provides:

	Onshore	Offshore		Onshore	Offshore
Bit & Tool Sales/Rental/Repair			Building/Janitorial Service		
Casing Crew			Catering		
Cathodic Protection			Cementing		
Coiled Tubing/Snubbing			Communications/Scada		
Completion			Compression Rental & Maintenance		
Corrosion Control			Crane Services		
Directional Drilling/LWD/MWD			Diving/ROV		
DOT Covered Tasks			Drilling Fluids		
Drilling Services			Drilling Contractor		
Electrical Contractor			Electrical Submersible Pumps		
Electric Supplies			**Engineering Services**		
Environmental Services			Fabricator		
Gas Processing Chemicals			General Contractor/Construction		
General Oil Field Services			Heavy Equipment (Earthmoving), etc.		
Hot Oil Services			Instrumentation/Controls		
Laboratory Services/Core Analysis			Logistic Services		
Lubricants/Fuel			Machine Shop Services		
Mud Logging			Non-destructive Testing		
Painting/Blasting/Coating			Personnel Services		
Pipeline Construction			Production Chemicals		
Production Services			Rig Rental Tools/Fishing		
Rod Pumps/Rods			Roustabouts/Contract Labor		
Safety, Health & Environmental Consulting & Training			Scaffolding		
Security			Seismic/Geophysical		
Survey			Tank/Vessel Cleaning		
Transportation—Aircraft			Transportation—Land		
Transportation—Marine			Tubular Inspection & Coatings		
Valve Reconditioning/Repair			Waste Disposal		
Welding Contractors			Wellheads		
Well Logging/Wireline			Well Service Contractor		
Well Stimulation/Acidizing			Workover Contractor		
Other Specialties:					

2b. Do you conduct any of the following specialty tasks while providing your service?

	Onshore		Offshore	
Asbestos Abatement	Yes	No	Yes	No
Confined Space	Yes	No	Yes	No
Crane Operations	Yes	No	Yes	No
Emergency Response	Yes	No	Yes	No
Gas Detection System/Repair	Yes	No	Yes	No
Hot Tapping	Yes	No	Yes	No
Hot Work	Yes	No	Yes	No
Lead Abatement	Yes	No	Yes	No
Naturally Occurring Radioactive Material (NORM)	Yes	No	Yes	No
Work in H_2S areas	Yes	No	Yes	No

2c. Do you have vessels under U.S. Coast Guard regulations?

Yes	No	NA

If *YES*, see attached: *MARINE MODULE*
If *NO*, go to question *3*

MARINE MODULE

MM1. Does your company operate cargo vessels of 500 gross tons or greater?

Yes	No	NA

MM2. Are these vessels ISM Code certified?

Yes	No	NA

- If you answered *YES* to question MM2, *skip to question MM27* (leave questions MM3 – MM26 blank).
- If you answered *NO* to question MM2, *answer questions MM3 – MM26* (leave questions MM27 – MM28 blank).

MM3. Does your company have written health, safety and environmental (HSE) policies and procedures?

Yes	No	NA

MM4. Are these procedures located both at your shoreside headquarters and aboard each vessel?

Yes	No	NA

MM5. Does your HSE program include written procedures for the following:

a. safe operation of vessels?

Yes	No	NA

b. pollution prevention?

Yes	No	NA

c. reporting shipboard incidents and non-conformances to shoreside management?

Yes	No	NA

d. conducting management reviews of your HSE program?

Yes	No	NA

MM6. Explain your method for ensuring that the objectives of your HSE policies are achieved?

_____

_____

MM7. Explain how you verify that your HSE policies are implemented at all levels of the company, both shoreside and aboard all vessels.

_____

_____

MM8. What is the name and title of the person in your company who has the ultimate responsibility for ensuring that your company's safety and environmental policies are followed?

Name:		Title:	

MM9. How do you ensure that safety and environmental-protection responsibilities are communicated to and understood by vessel personnel and shoreside personnel?

_____

MM10. Do you give your Vessel Masters primary responsibility and authority for ensuring safety aboard their vessels?

Yes	No	NA

Is this communicated in writing?

Yes	No	NA

MM11. How do you monitor your operations to ensure that HSE policies and procedures are being followed aboard your vessels?

_____
_____
_____
_____

MM12. Explain your method for ensuring that vessel personnel are medically fit for their work activities.

_____
_____
_____
_____

MM13. Explain your method for ensuring that vessel personnel are properly trained and licensed for their work activities.

_____
_____
_____

MM14. How do you ensure that new personnel or personnel receiving new vessel assignments are given proper familiarization with the vessel and their shipboard duties?

_____
_____

Is this familiarization process documented?

Yes	No	NA

MM15. Do all vessels have detailed written procedures that address safety and environmental protection for key shipboard operations?

Yes	No	NA

MM16. Do these procedures clearly identify and assign the personnel who are qualified to perform specific functions?

Yes	No	NA

MM17. What procedures are in place for identifying and responding to shipboard emergencies (i.e., fire, man overboard, abandon ship)?

_____
_____

MM18. How often do your vessels conduct the following drills:

a. Fire _____
b. Man Overboard_____
c. Abandon Ship_____

MM19. How are these drills documented? _____

MM20. What provisions have you put in place to ensure that your company's shoreside headquarters can respond to a vessel emergency at any time?

_____

_____

MM21. Explain your company's method for ensuring that non-conformances, accidents, and hazardous situations (near misses, spills, etc.) occurring onboard vessels are reported to shoreside management, investigated and responded to with appropriate corrective action.

_____

_____

MM22. Explain your method for ensuring that each vessel's equipment and machinery is properly maintained in accordance with manufacturer's specifications and applicable regulations.

_____

_____

MM23. Does your preventative maintenance program identify and give special consideration to certain critical equipment to avoid hazardous situations if it should fail?

Yes	No	NA

MM24. How do you ensure that all vessels maintain the necessary documentation onboard?

_____

_____

MM25. Do you conduct internal audits onboard vessels and at shoreside headquarters?

Yes	No	NA

MM26. Explain your method for ensuring company-wide implementation of the corrective actions necessary to address audit findings.

_____

_____

MM27. When was your last shoreside ISM Code compliance audit? _____

a. Were any non-conformances identified?

Yes	No	NA

b. Have they been resolved?

Yes	No	NA

c. If not, what is your target date for having them resolved? _____

MM28. When was your last vessel ISM Code compliance audit? _____

a. Were any non-conformances identified?

Yes	No	NA

b. Have they been resolved?

Yes	No	NA

c. If not, what is your target date for having them resolved? _____

(Return to Question 3—Standardized Safety Questionnaire)

3. In the table below, provide the ____ most recent full years of incident information for your company, division or subsidiary. *Offshore data must be included (if applicable).*

In addition to completing the tables, submit copies of your company's logs for each of the ___ years listed.

INCIDENT/ILLNESS RECORDATION

Note: *If EMR does not apply, NUMBER OF EMPLOYEES & EMPLOYEE HOURS STILL NEEDS TO BE COMPLETED.*

Year	Average Number of Employees	Exposure or Employee Hours[a]	Number of Recordable Cases	Total Recordable Incidence Rate[b]	Days Away from Work, Restricted Duty of Job Transfer Cases	Incidence Rate for DART Cases[c]	Number of Days Away from Work	Severity Rated	EMR	Number of Fatalities	LTA/Total Accident Ratio[e]
200_	Q4 _____ Q3 _____ Q2 _____ Q1 _____										
200_	Q4 _____ Q3 _____ Q2 _____ Q1 _____										

Notes:
[a] List the total number of hours worked during the year by all employees including those in operations, production, maintenance, transportation, clerical, administration, marketing and other activities. This is also known as man-hours worked.
[b]Number of recordable cases times 200,000 divided by exposure or employee hours.
[c]Number of lost workday (days away), restricted duty and job transfer cases (DART) times 200,000 divided by exposure or employee hours.
[d]Total number of lost workdays times 200,000 divided by exposure or employee hours.
[e]Number of lost workday cases divided by the total number of recordable cases.

Comments:_____
_____
_____
_____
_____

4a. Are employees from other offices/districts ever utilized?

Yes	No	NA

4b. If an employee from another district is injured, at which office/district is their injury recorded?

5a. Specify the basis for exposure or employee hours:

8 Hr. Shifts		12 Hr. Shifts	

5b.

Other:

6a. Are *all* documents pertaining to this questionnaire available for auditing?

Yes	No

6b. If no, please explain:

7a. Has your company, or the owners of your company, operated under a different name in the last three years?

Yes	No

7b. If yes, what was the name and location of the company?

TRAINING

8. Please respond as indicated below (*see example*). *Do not leave any items unanswered*. (Estimated Percentage of Employees should reflect the percentage of employees who are *required* to have the training—*not the percentage of the total number of employees in your organization*):

Only specific answers are allowed; if you answer "YES" to "Is program written?" you MUST answer "Yes" or "No" to "Is employee training documented?" Answer only as shown (at right) to frequency and number of employees.		Answer with **Yes, No, or N/A ONLY**	Answer with **Yes, No, or N/A ONLY**	Answer **ONLY** Weekly, Monthly, Semi-Annually, Annually, As Required, Other or N/A	Answer with Whole numbers **ONLY** (100, 50, 0) (Do NOT enter % sign, commas, periods, etc.)
Training Program	Detail regulatory or best practice reference	Is this program written? Yes/No/NA	Is employee training documented? Yes/No/NA	What frequency is this training given?	Of the employees that NEED this training, what % have received it?
Abrasive & Hydro Blasting					
Access to Medical Records					
AED (Automatic External Defibrillators)					
Asbestos Exposure Control					
Behavioral Based Safety Awareness					
Benzene Awareness					
Bloodborne Pathogens					
CERCLA (Comprehensive Environmental Response Compensation Liability Act)					
Confined Space—*Awareness*					
Confined Space—*Attendant*					
Confined Space—*Entrant*					
Confined Space—*Rescuer*					
Confined Space—*Supervisor*					
CPR (Cardio Pulmonary Resuscitation)					
CRANES					
Defensive Driving					
Electrical Safety Awareness					
Emergency					
Evacuation Plan					
First Aid					
Forklift					
Harassment & Discrimination Training					
Hazard Communication					
Hazwoper—*First Responder Awareness*					
Hazwoper— *First Responder Operations/8 Hour*					
Hazwoper— *First Responder Technician/24 Hour*					
Hazwoper—*Incident Commander*					
Hazwoper—*Supervisor/8 Hour*					
Hazwoper—*Technician/40 Hour*					
Hearing Conservation					
Hm 126—*Awareness*					
Hm 126—*Transportation*					
Hot Work					
HUET (Helicopter Underwater Egress Training)					

Training Program	Detail regulatory or best practice reference	Is this program written? Yes/No/NA	Is employee training documented? Yes/No/NA	What frequency is this training given?	Of the employees that NEED this training, what % have received it?
Hydrogen Sulfide					
Incident Investigation					
Incident Reporting Awareness					
Incipient Fire Fighting					
JSA (Job Safety Analysis)					
Journey/travel Management					
Lead Exposure Control					
Lockout/Tagout—*Authorized*					
Lockout/Tagout—*Affected*					
Lockout/Tagout—*Other*					
Management of Change					
Manual Lifting Techniques					
New Employee Orientation					
NORM (Naturally Occurring Radioactive Materials)					
OPA 1990 (Oil Pollution Act of 1990)					
Basic Orientation					
PEC or Equivalent *Offshore Orientation*					
Personal Protective Equip.—*See Question 21*					
Process Safety Management					
Production Safety Systems/T2					
RCRA (Resource Conservation and Recovery Act)					
Respiratory Protection					
Rigging/Material Handling					
SARA III (Superfund Amendment Reauthorization Act)					
Scaffolding					
Security					
SEMP (Safety Environmental Management Plan)					
SPCC (Spill Prevention Control and Countermeasures)					
Substance Abuse Awareness—*See Question 23*					
Supervisor Training					
Survival Craft					
Total Quality Management					
Toxic Substances Control Act (TSCA)					
Trenching & Excavation					
Waste Management					
Water Survival—*Classroom*					
Water Survival—*In Water*					
Welding and Burning					
Well Control					
Work/Post Injury Mgt.					

9. Please provide any additional information on other industry-specific programs or training, including written procedures, which your company provides to employees:

_____

_____

_____

_____

_____

COMMUNICATIONS

10a. Are language barriers addressed in your HSE programs?

Yes	No

10b. If yes, what is the common language? (list below)

11. What language(s) is/are your HSE policies & procedures written? (please list all below)

12a. Has your company had any incident(s) where a causal factor was a language barrier/issue?

Yes	No

12b. If yes, please describe what was done to address this causal factor.

SAFETY MEETINGS

13a. Does your company have scheduled documented employee safety meetings?

Yes	No

13b. *If yes, how often?*

14. Who conducts the safety meetings?

Name:		Title:	

15. What managers/supervisors participate in the safety meetings?

Name:		Title:	

16. Are meetings reviewed and critiqued by managers/supervisors?

Yes	No	NA

17. What were the topics or issues discussed at the last two safety meetings:

Date	Subject

18a. Does your company hold on-site (tailgate/toolbox/pretour) safety meetings?

Yes	No

18b. *If yes, how often?*

19a. Who conducts these safety meetings?

Name:		Title:	

19b. Is documentation available?

Yes	No	NA

20. Does your company perform Job Safety Analysis (JSA)/Job Risk Analysis (JRA) or equivalent?

Yes	No

PERSONAL PROTECTIVE EQUIPMENT

21. Circle the following personal protective equipment your company provides/requires:

PPE	Company Provided			Company Required		
Eye Protection	Yes	No	NA	Yes	No	NA
Fall Protection	Yes	No	NA	Yes	No	NA
FRC Fire Retardant Clothing	Yes	No	NA	Yes	No	NA
H_2S Personal Alarm Monitors	Yes	No	NA	Yes	No	NA
Hand Protection	Yes	No	NA	Yes	No	NA
Hard hats	Yes	No	NA	Yes	No	NA
Hearing protection	Yes	No	NA	Yes	No	NA
Personal Flotation Devices	Yes	No	NA	Yes	No	NA
Respiratory protection	Yes	No	NA	Yes	No	NA
Safety shoes	Yes	No	NA	Yes	No	NA

22. In addition to regulatory required Personal Protective Equipment, what other PPE is required or supplied?
If any, please describe or list:

_____
_____
_____
_____
_____
_____

DRUG AND ALCOHOL PROGRAM

23a. Does your company have a written policy regarding drug screening or testing of your employees?

Yes	No

23b. Does your drug-testing program conform to government requirements?

Yes	No	NA

23c. Comments:

23d. If yes, circle which set of regulations does your drug-testing program satisfy?

U.S. Federal Aviation Administration 14 *CFR*, Part 91.17	Yes	No	NA
U.S. Federal Highway Administration 49 *CFR*, Part 392	Yes	No	NA
U.S. Federal Railroad Administration 49 *CFR*, Part 219	Yes	No	NA
U.S. Research and Special Projects Administration Pipeline 49 *CFR*, Part 199	Yes	No	NA
United States Coast Guard 33 *CFR*, Part 95	Yes	No	NA

23e. Circle the circumstances in which your company's employees may be subject to drug screening.

Employment	Yes	No	NA
Periodic	Yes	No	NA
Post Accident	Yes	No	NA
Probable Cause	Yes	No	NA
Random	Yes	No	NA
Other:			

INCIDENT PROCEDURES

24a. Does your company have a written policy that describes roles and responsibilities that will be initiated in the event of an accident?

Yes	No	NA

24b. Is this policy communicated so all employees understand your company's position?

Yes	No	NA

25. Does your company require an authorized individual to accompany injured employees to the medical provider for initial treatment?

Yes	No	NA

26. Does your company have a policy requiring written accident/incident reports (spills, injuries, property damage, near misses, fires, explosions, etc.)?

Yes	No	NA

27. Does your company conduct accident/incident investigations?

Yes	No	NA

28. Are accident/incident reports reviewed by managers/supervisors?

Yes	No	NA

29a. Does the company document, investigate, and discuss near miss accidents?

Yes	No	NA

29b. If yes, is documentation available?

Yes	No	NA

30. Does your company have a written restricted duty/light duty policy?

Yes	No	NA

31a. Does your company utilize a specific medical provider that understands your company's restricted duty/light duty policy?

Yes	No	NA

31b. Comments:

_____

_____

_____

32. Does your company have a written process in place to share the lessons learned from accidents with the entire workforce?

Yes	No	NA

33. On large projects do you employ a paramedic, nurse or physician at the worksite?

Yes	No	NA

SUBCONTRACTORS

34a. Does your company use Subcontractors?

Yes	No	NA

34b. If yes, choose which categories from question 2 they fall under:

34c. Does your company review the safety, health, and environmental (HSE) systems of Subcontractors?

Yes	No	NA

34d. Does your company verify that Subcontractors meet or exceed your safety and training requirements?

Yes	No	NA

34e. If yes, how do you verify this information?

34f. If no, please explain:

34g. Does your company use a temporary labor/leasing agency?

Yes	No	NA

34h. Are Subcontractor exposure hours reflected in your company exposure hours of question 3?

Yes	No	NA

SAFETY, HEALTH, & ENVIRONMENTAL MANAGEMENT

35a. Does your company establish annual goals in any of the following?

Safety	Yes	No	NA
Health	Yes	No	NA
Environmental	Yes	No	NA
Spill Response	Yes	No	NA
Waste Management	Yes	No	NA

35b. If yes, describe the training and documentation aspects of the program:

36a. Has your company received any citations or fines from a regulatory agency during the last three years?

List Relevant Regulatory Agency	Fine?		How Many?
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	
	Yes	No	

36b. If yes please provide details:

36c. If the answer to question 36a is yes, have all issues been resolved with the regulatory agency?

Yes	No	NA

36d. If the answer to question 36a is no, please provide details:

37. Are employees provided with their own copy of the company's HSE handbook?

Yes	No	NA

38. Does the company have a Safety Committee?

Yes	No	NA

39a. Does your company have a HSE Incentive/Recognition Program?

Yes	No

39b. If yes, please describe:

40a. Are awards earned based on individual or group performance?

40b. Does Management receive pay bonuses for their company's HSE performance?

Yes	No	NA

40c. If yes, describe the basis for earning a HSE performance bonus?

41. Describe the programs utilized to monitor and determine the progress of HSE performance in your company (e.g., management meetings, safety committee/team, statistical reports, etc.):

42. Does the company have a policy manual with a clearly written HSE policy endorsed by upper management?

Yes	No

43a. Does your company involve its employees in HSE awareness programs?

Yes	No	NA

43b. If yes, describe how they are involved:

44. Who in your company is responsible for coordinating your HSE program?

Name:		Title:	

45a. *Is HSE a full time responsibility for this person*?

Yes	No

45b. If no, list the percentage of time devoted to HSE:

%

46a. Does your company perform self-inspections of its HSE programs?

Yes	No

46b. *If yes, are they documented*?

Yes	No	NA

46c. Who reviews the HSE audit/inspections?

Name:		Title:	

47. Do your managers, supervisors, and employees understand that no weapons or firearms of any type are allowed on the worksite?

Yes	No

48a. Does your company have a Short Service Employee (SSE) policy that identifies new employees or experienced employees new to your company or new in their position?

Yes	No	NA

48b. If yes, does your SSE policy include a means to visually identify a SSE?

Yes	No

49a. Does your SSE policy include a mentor being assigned to the SSE?

Yes	No	NA

49b. If yes, does it define the roles and responsibility of the mentor?

Yes	No

50a. Does your company have quantifiable training requirements (job specific) for new employees or experienced employees new to their position?

Yes	No

50b. If yes, please describe:

51a. Does your company have a behavioral based safety program in place?

Yes	No

51b. If yes what is the name of your program?

51c. Does your company have a documented inventory of critical safe behaviors associated with your work activities?

Yes	No

51d. Do all employees participate in documented behavior observations?

Yes	No

51e. Does your company perform formal, documented trend analysis of behavior observations?

Yes	No

52. Does your company have a policy/best practices on cell phone usage while operating a motor vehicle?

Yes	No	NA

INDUSTRIAL HYGIENE (IH)/OCCUPATIONAL HEALTH SECTION

53a. Do you perform IH monitoring on your employees? (If No, skip to 53c)	Yes	No	NA
53b. Please indicate for what substances:			
• Asbestos	Yes	No	NA
• Benzene	Yes	No	NA
• Lead	Yes	No	NA
• Radiation	Yes	No	NA
• Silica	Yes	No	NA
• Total Hydrocarbons	Yes	No	NA
• Welding Fumes	Yes	No	NA
• Other (Please List)	Yes	No	NA
53c. Do you have a hearing conservation program?	Yes	No	NA
53d. Does your company have offshore crane operators? (If No, skip to 53f)	Yes	No	NA
53e. Do your offshore crane operators have API RP 2D physicals?	Yes	No	NA
53f. Where are IH monitoring records kept?			
53g. Do you have employees who wear respirators? (Canister or SCBA)	Yes	No	NA
• Are they medically cleared?	Yes	No	NA
• Are they annually fit tested?	Yes	No	NA

54. Does your company conduct fitness for work exams for any of the following?

Pre-employment	Yes	No	NA
Re-employment	Yes	No	NA
Respiratory	Yes	No	NA
Visual	Yes	No	NA
Other:			

ENVIRONMENTAL ISSUES

55a. Is your company required to have any federal, state, or local licenses or permits to perform their service(s) (e.g., NORM, asbestos, DOT, lead, explosives, etc.)?

Yes	No	NA

55b. If yes, list types of licenses/permits and jurisdiction of issue:

Jurisdiction	Permit Type

56a. Does your company have a written environmental program?

Yes	No	NA

56b. If yes, describe the training and documentation aspects of the program:

57a. Does your company allocate time and resources to train all supervisors in environmental and regulatory compliance?

Yes	No	NA

57b. *If yes, who is responsible for this training*?

Name:		Title:	

58a. Is this a full time responsibility for this position?

Yes	No	NA

58b. If no, list the percentage of time devoted to environmental and regulatory compliance:

%

59. Does your company have waste management plans?

Yes	No	NA

60. Does your pre-job planning process include environmental concern? (waste, release, permit violation)

Yes	No	NA

61. Does your company's mission statement include environmental goals?

Yes	No

62a. In conjunction with safety meetings, does your company include environmental topics?

Yes	No	NA

62b. If yes, please provide some examples:

63a. Has your company reported any spills in the last three years?

Yes	No	NA

63b. If yes, what was the total volume reported for each year? _____
_____

QUALITY ASSURANCE/QUALITY CONTROL

64. Does your company have a Quality Assurance/Quality Control Department?

Yes	No

65a. Does your company have a Quality Assurance/Quality Control manual?

Yes	No

65b. *If yes, is it available for review*?

Yes	No	NA

66. Does your company have a management of change process/program?

Yes	No	NA

67a. *Does your company have a preventative maintenance program for company owned equipment*?

Yes	No	NA

67b. If yes, which equipment is covered?

67c. Does your company keep preventative maintenance and equipment inspection records on file?

Yes	No	NA

68a. Does your company perform background checks on potential employees?

Yes	No	NA

68b. If yes, what type of check: _____State _____Federal / Agency _____

69. Do you provide picture I.D. for employees going on operator properties?

Yes	No	NA

70. Having completed this survey, do you have any additional comments or questions to discuss?

_____
_____
_____
_____
_____

APPENDIX A-2—SAMPLE SAFETY AND TRAINING SURVEY

Date (MM/DD/YYYY):_____
Name of Company: _____
Address:_____
City:_____
State:_____
Zip:_____

Contact:_____
Form Completed By:_____
Phone #:_____
Fax #:_____
E-Mail: _____

1. Check the categories that describe the services your company provides:

   ☐ Offshore Drilling Contractor

   ☐ Land Drilling Contractor

   ☐ Service Company
   (Specify) _____

   ☐ Labor Provider or Other
   (Specify) _____

2. Please describe the area or region this questionnaire applies (i.e., local Division, District, Branch):
_____

3. In the table below, provide the three most recent years of incident information for your company.

   ☐ Total Company ☐ Region (Specify) ☐ _____

Year	Exposure or Employee Hours	Number of Total Recordable Cases	Incident Rate of Recordable Cases	Number of Lost Workday Cases	Incidence Rate of Lost Workday Cases	Number of Fatalities

4. Specify the basis for exposure or employee hours:

   8 hr. shifts ☐ Yes ☐ No

   12 hr. shifts ☐ Yes ☐ No

   24 hr. shifts ☐ Yes ☐ No

   Other: _____

5. Worker's Compensation EMR-Land Contractors & Land Service Company Operations Only
_____

6. Leadership and Commitment			
Commitment to HSE through leadership:			
No commitment from senior management ☐	HSE disciplines delegated to line managers—no direct involvement by senior management ☐	Evidence of active senior management involvement in HSE aspects ☐	Evidence of a positive HSE culture in senior management and at all levels ☐
7. Policy and Strategic Objectives			
Does your company have a safety manual with a clearly written safety policy endorsed by senior management? ☐ Yes ☐ No Does your company have a written environmental program? ☐ Yes ☐ No			
HSE policy documents and availability:			
No written HSE policy ☐	A policy statement exists but not in a widely distributed document ☐	HSE policy establishes responsibility for HSE, but not widely distributed ☐	Policy with clearly established responsibility and accountability; is distributed to all employees; and is visible on notice boards ☐
8. Organization, Responsibilities, Resources, Standards and Documentation			
HSE communication and safety meeting programs:			
None ☐	Periodic HSE/safety meetings for special operations only ☐	HSE/safety meetings performed on a regular basis at management and supervisor level ☐	In addition to regularly scheduled meetings, employees are assigned topics to discuss on a rotational basis ☐
Does your company have scheduled and documented safety meetings? ☐ Yes ☐ No If yes, how often? _____ Are meetings reviewed and critiqued by supervisors and/or managers? ☐ Yes ☐ No Are pre-tour/pre-job/toolbox/tailgate safety meetings conducted? ☐ Yes ☐ No Are they documented? ☐ Yes ☐ No			
Employee orientation and training program:			
No formal program ☐	Verbal instructions on company procedures only Orientation booklet provided for new employees but no on-the-job orientation by supervisor ☐	Employee handbook provided and supervisor outlines, explains and demonstrates new employee's job ☐	All of the adjacent together with: follow-up observation of the new employee's work is also included. Employee has been advised of safe practices and emergency duties ☐
HSE/specialized training:			
No HSE training established ☐	On-site basic training conducted occasionally ☐	HSE training is given for specialized operations, but no routine training conducted ☐	Formal HSE training program have been developed in all areas and are conducted on a regular basis. Retraining periods are established ☐
Subcontractors: Does your company use Subcontractors? ☐ Yes ☐ No Does your company review the safety management systems of Subcontractors? ☐ Yes ☐ No			
No written arrangements ☐	Written arrangements in place for basic HSE matters only ☐	HSE arrangements incorporated in HSE manual but not in a format which is distributed to all employees ☐	HSE arrangements exist in handbook form, distributed to all employees, Subcontractors, Subcontractor employees and are enforced. Follow-up audits held with discussion/feedback to management and employees ☐

9. Hazards and Effects Management			
Hazards Assessment: Does your company perform Job Safety Analysis (JSA)? ☐ Yes ☐ No			
Company's HSE system does not include hazards assessment ☐	Company's HSE system makes reference to the need to assess hazards but has no comprehensive structure to carry this out ☐	Company's HSE system includes methods for the assessment of major hazards ☐	Company's HSE system has a comprehensive set of methods for the assessment of all HSE hazards and applies them to all of its contracts with documentation ☐
Exposure of the workforce:			
Company does not actively advise the workforce nor monitor exposure ☐	Company advises the workforce of the major hazards that they are likely to be exposed to but only monitors exposure randomly ☐	Company has formal methods for monitoring exposure to the major hazards ☐	Company has a set of formal methods for monitoring exposure to all foreseeable hazards (linked to its hazards assessment method) and applies them to all contracts ☐
Potential hazards (chemical, physical and biological hazards such as noise, radiation, vapors, fumes, temperature extremes, etc.):			
Company makes no special provision for advising the workforce about properties of potential hazards ☐	Company provides information to workforce in the workplace on properties of potential hazards but has no active follow-up ☐	Company distributes information to individuals in the workforce at start of their involvement on-site ☐	Company maintains a database of the properties of all potential hazards encountered in its contracts and has formal methods of information distribution to all personnel and trains its workforce in handling, etc. ☐
Personal protective equipment:			
Basic PPE provided to personnel but no corporate procedure for assessing individual needs ☐	PPE requirements formally assessed but little effort made to ensure correct usage ☐	PPE requirements formally assessed with spot checks on usage ☐	Procedures in place to assess all PPE requirements, monitor and enforce usage and replacement needs. Stock inventories monitored, kept above demand levels. Training in use provided where needed ☐

10. Does your company provide/require the following personal protective equipment:

Hard Hats	Yes	No	N/A
Safety Shoes	Yes	No	N/A
Eye Protection	Yes	No	N/A
Hand Protection	Yes	No	N/A
Hearing Protection	Yes	No	N/A
Fall Protection	Yes	No	N/A
Respiratory Protection	Yes	No	N/A
Chemical Protection (Gloves, Apron, Face Shield)	Yes	No	N/A

11. Waste management:			
Company has no formal methods for the control of waste ☐	Company has general procedures for waste disposal ☐	Company has procedures for the disposal of each of the main categories of site wastes but makes no provision for minimizing environmental impact ☐	Company has a formal system for waste management (including identification, minimization and classification), which actively seeks to minimize environmental impact ☐

12. Planning and Procedures Does your company have a formal Safety Management System? ☐ Yes ☐ No			
HSE or operations manuals:			
No HSE procedures available ☐	Basic HSE procedures exist ☐	Contractor has written HSE procedures to cover all hazardous operations ☐	Contractor has procedures to cover all HSE precautions. HSE plan has a system of updating and dissemination information to employees ☐
Equipment control and maintenance:			
No defined program to identify or evaluate hazardous practices and equipment conditions ☐	Plan relies on outside sources, i.e., company inspections. Supervisory inspection of equipment confined to worksite personnel only ☐	A written program outlining supervisory guidelines, responsibilities, frequency and follow-up is in effect ☐	Additionally, periodic inspections are conducted by top management or by teams of specialists ☐
Road safety management:			
No special attention paid to road safety as an area of hazardous activities ☐	Importance of road safety acknowledged but left to core business managers/supervisors to enact individually ☐	Company has a general management strategy with some procedures for its component issues ☐	Company has a complete strategy and set of plans and procedures covering vehicles, drivers and operations management ☐
13. Implementation and Performance Monitoring			
Management and performance monitoring of work activities:			
No system for formally monitoring HSE performance ☐	Performance monitoring in a few areas carried out ☐	Company has a system for monitoring HSE performance in key areas ☐	Company has a comprehensive system for monitoring performance in all areas with feedback to employees for improvement. ☐
Incident investigation and reporting: Does your company conduct accident/incident investigations? ☐ Yes ☐ No Does your company document near misses and investigate same? ☐ Yes ☐ No Do you perform Root Cause Analysis or Corrective Action Investigations? ☐ Yes ☐ No			
Findings not generally communicated ☐	Findings communicated to key personnel only via limited company internal memo or similar media ☐	Findings communicated to all employees via specific company notice ☐	Additionally, the findings specify the means for improving HSE performance ☐
14. Auditing and Review			
Auditing: Does your company perform safety audits/reviews? ☐ Yes ☐ No			
Audit process is cursory only—HSE documents are not explicit about auditing ☐	Company HSE documents include reference to auditing but there are no specific details about scheduling and coverage ☐	Company HSE documents include details of how auditing is to be implemented with schedules/coverage for the key areas ☐	Additionally, the HSE documents specifies management's role in audit and follow-up on action items ☐

15. Please respond to *ALL* items with "Yes, No, or NA" Do not leave any items unanswered. (Estimated Percentage of Employees should reflect the percentage of employees who are required to have the training—not the percentage of the total number of employees in your organization.):

Programs/Training	Program Documented and Written	Estimated Percentage of Employees Receiving Training	Frequency of Training for Individual Employees	Individual Employee Training Documented Yes/No/NA
Offshore Safety Orientation				
Bloodborne Pathogens				
Confined Space Entry				
Cranes				
Defensive Driving (Land)				
Drug Awareness				
Emergency Response				
First Aid/CPR				
Forklifts, if Applicable				
H_2S, if Applicable				
HAZCOM				
Noise Protection Program				
Fire Fighting				
Lockout/Tagout				
Personal Protective Equip.				
Safety Mgmt. System				
Respiratory Protection				
Welding and Burning				
Well Control/Completion/ Workover				
Manual Lifting Techniques				
Rigging/Material Handling				
Behavior Based Safety Training				
Supervisory Skills				
Survival Craft (Offshore)				
Total Quality Management				
Water Survival (Offshore)				

16. Does your company have a short service employee program? ☐ Yes ☐ No

17. Does your company have a written policy regarding drug screening or testing of your employees? ☐ Yes ☐ No

18. Does your drug-testing program conform to U.S. DOT requirements? ☐ Yes ☐ No

19. Indicate the circumstances in which your company's employees may be subject to drug screening.

☐ Employment ☐ Random ☐ Probable Cause ☐ Post Accident ☐ Periodic ☐ Other: _____

20. Does your company have policy requiring written accidents/incident reports (spills, injuries, property damage, etc.)?

☐ Yes ☐ No

21. Does your company have a Safety Incentive/Recognition Program? ☐ Yes ☐ No

22. Are all documents relevant to this questionnaire available for review/audit? ☐ Yes ☐ No

VALIDATION STATEMENT

I, the undersigned, do hereby state:

I am authorized to submit this form on behalf of the company listed above, and the information on this form is valid and accurate to the best of my knowledge.

Signature: _____

Date: _____

APPENDIX B—SAMPLE SHORT SERVICE EMPLOYEE PROGRAM DEVELOPMENT GUIDELINE

This *guideline* provides examples of elements to consider when preparing, revising or reviewing an onshore or offshore (as applicable) short service employee (SSE) program.

A short service employee program may apply to either a company's own employees or to contract employees utilized by the company.

Scope

The scope of this example document applies to oil and gas well drilling, servicing, and producing operations. Due to the many diverse characteristics of these operations, special modifications may be necessary that differ substantially from this example program.

Purpose

- Identify who the program applies to: contract personnel, Subcontractor personnel and company personnel.
- Provide the objective of the program which is typically to ensure that short service employees are identified, appropriately supervised, trained and managed in order to prevent injury to themselves or others, property damage or environmental harm.

Short service employee designation

- Less than 6 months continuous employment with present employer.
- Operator-specific exceptions.

Release from SSE status

- Completed all required training, and
- Mentor, direct supervisor and Operator representative recommendation for release.

Identification

- Standard color hard hat used only by SSE (preferred), or
- Identifiable sticker on hard hat,
- When the personnel are no longer SSEs, SSE identification should be removed/replaced.

Orientations

- Company (Operator/Contractor) using contract personnel:
    - o Ensure that the job site information applicable to the Contractor's employees is communicated to the Contractor. This should address site or location-specific HSE policies and restrictions.
    - o Once the Contractor is chosen, ensure that the initial orientation is given to current and new employees.
- Employers:
    - o Provide an initial HSE orientation program appropriate to the job description.
    - o HSE orientation may be an accredited program such as IADC's "Rig Pass," or API's Training Provider Certification Program (TPCP).
- Notification of operator prior to the arrival of any SSEs assigned to the site.

SSE Mentoring Program

- A mentoring program is a component of the SSE program.
- Purpose of the mentoring program is to provide for guidance and development of the SSE by a peer and provide for the transferring of skills and knowledge from one person to another in a work environment.
- Each SSE should be assigned to a mentor, which may be the SSE's supervisor or other person that has experience and job specific knowledge adequate to instruct and mentor the new employee.
- SSE responsibilities should be clearly outlined such as the following:

  - o Seek assistance and guidance from his mentor when uncertain about any part of his job or for a task he/she has never done before.
  - o Open to feedback from the mentor.
  - o Adhere to all policies and procedures taught or shown to him/her.
  - o Work in a safe and environmentally sound manner.
- Mentor's responsibilities should be clearly outlined and include the following:
  - o Lead by example and refrain from taking short cuts and doing anything hazardous to health and safety or that could cause environmental harm.
  - o Ensure the SSE understands the scope of work being performed that day.
  - o Reviews with the SSE the known hazards of the work being performed and advise on safe work practices to be followed.
  - o Show the SSE how to prepare and follow a JSA.
  - o Be available for and encourage questions.
  - o Observe SSE while performing duties.
  - o Provide close supervision.
- Mentor should have the following qualifications and characteristics:
  - o Experienced employee with requisite skills and knowledge.
  - o Provide a positive safety attitude, avoid criticism and strive to build up confidence and self-esteem in the SSE.

APPENDIX C—SAMPLE TRAINING MATRIX

Initial Employee Training Program Development Guideline

This guideline provides a listing of elements to consider when preparing, revising or reviewing a training program for employees entering the oil and gas upstream work environment and is designed to work in tandem with a company's short service employee program. The training may apply to either a company's own employees or to contract employees utilized by the company.

Purpose of the Program

- Identify whom the training matrix applies to such as contract personnel, Subcontractor personnel and company personnel.
- Provide the objective of the Initial Training Program, which is to provide minimum standards in HSE training for all employees with the goal of an incident-free work place.

Covered Employees

This program may apply to all employees assigned work in the oil and gas exploration, production and support services industry.

Orientation Awareness Training

Orientation is site-specific information about policy, protocol and work environment that is presented upon arrival at the work facility, at a training center, if applicable, or at the company's office.

Awareness training is defined as the ability to recognize hazards and appropriate actions for a particular task or condition in the workplace.

Employees should receive awareness level training in all the recommended subject topics. It is further recommended that training in these topics be completed within the Short Service Employee (SSE) period as the minimum training requirement for transition out of the SSE classification.

Sample Training Matrix

The training matrix provides examples of subject matter that may be covered in the training program. The course duration is dictated by the amount of time necessary to deliver awareness and is left to the discretion of the company.

Orientation

Company provides or requires Contractor to provide a location specific HSE orientation focused on company and Contractor's HSE policies applicable to the location and work assignment.

If company or Contractor is expecting an employee or specialist who does not normally work in the upstream environment (e.g., company executive, politician, equipment engineer from factory in consultant role) then the company or Contractor may vary from any of these requirements, as applicable, provided the company makes arrangements for alternatives.

Training Course Title	Sub-categories
BASIC AWARENESS	
Access to Medical Records	
Bloodborne Pathogens	
Confined Space Awareness	
Drug and Alcohol (Awareness)	
Electrical Safety Non-electrical Workers	
Emergency Action Plan	Chain of Command
	Facility Evacuation
	Man Overboard (Offshore Only)
	Fire/Explosion
	Spill/Release
Environmental Awareness	Waste Management
	Spill or Release Prevention/Reporting

Training Course Title	Sub-categories
Ergonomics or Equivalent	
Excavation Safety (if Applicable)	
Fall Protection	Arrest Systems
	Restraint Systems
	Ladders/Stairs
	Scaffolding
	Walking/Working Surfaces
	Slips/Trips/Falls
	Open Hole
	Barricades
	Rescue
	Personnel Hoisting
Fire Prevention/Fighting Awareness	Portable/Fixed Fire Extinguishers
First Aid and CPR	
Hand Tools (Portable/Power)	Service Lines
Hazard Communication (HAZCOM)	
HAZWOPER (Awareness Level)	
Hearing Conservation	
Housekeeping	
Incident/Accident Prevention	Signs & Tags
Incident Reporting	
JSA Training	
Lockout/Tagout	
Material Handling	Crane Safety
	Rigger Safety
	Forklift Safety
	Manual Lifting
	Hoisting
	Pressurized Cylinders/Loading Racks
New Employee Orientation (Co. Specific)	
Offshore Personnel Transport/Transfer (Offshore Only)	Swing Ropes (Offshore Only)
	Personnel Baskets (Offshore Only)
	Helicopter (Offshore Only)
	Vessels (Offshore Only)
	Water Survival (Offshore Only, if Required)
Personal Protective Equipment (PPE)	
Respiratory Protection	
Safe Work Authorization	Safe Work Permits (Confined Space, Hot Work, etc.)
Simultaneous Operations (if Applicable)	
SSE/Mentoring Program, as Applicable	
Site Safety and Health	Environmental Exposure
	Dangers of Pressure

APPENDIX D—SAMPLE POLICY STATEMENT

MANAGEMENT COMMITMENT AND INVOLVEMENT POLICY STATEMENT

Safety, Health and Environmental Policy

Safety, Health and Environmental responsibility are of paramount importance to the Company. The Company will endeavor to conduct its business in such a way as to provide for the safety and health of its employees, Contractors, and all other persons who may be affected by its operations. The Company will further endeavor to conduct all of its operations in an environmentally responsible manner.

Objectives

- To set and maintain high standards of safety and health and environmental responsibility by adhering to established oilfield practices that provide for safe and environmentally responsible workplaces and operations.
- To maintain these standards by adhering to the relevant legal requirements.
- To provide opportunities for all employees to discuss matters of safety, health and the environment and to provide them with effective communication and training.
- To monitor and respond to customer, Third Party and public concerns about our operations.
- To plan and conduct our operations while giving priority to safety, health and environmental considerations.
- To support research on the safety, health and environmental effects of our operations.
- To promptly advise the appropriate governmental officials, employees, customers and the public of significant industry-related safety, health and environmental hazards and to recommend appropriate protective measures.
- To provide at all times a safe and environmentally responsible work place for all persons who may be affected by work operations.
- To conduct our operations safely, efficiently and economically while conserving resources by using energy efficiently and to commit ourselves to reducing overall emissions and waste generation.
- To counsel our customers, transporters and others in the safe use, transportation and disposal of our waste materials and to resolve problems created by handling and disposal of hazardous substances from our operations.
- To participate with government and others in the legislative and regulatory process to safeguard the workplace and the environment.
- To promote these principals by sharing experiences and offering assistance to others involved in oil and gas drilling operations, onshore and offshore.
- To ensure that all employees understand their responsibilities and attend to them with reasonable care.
- To review and revise objectives as appropriate.

Signed and dated by the President or CEO.

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