



**1.0 Policy**

Training and communication regarding worker health and safety are requirements of an effective Health and Safety Program. Canadian Plains Energy Services (CPES) is committed to improving worker safety knowledge and understanding through a continued training and communication process.

**2.0 Scope**

CPES will provide the education, training, and tools to conduct work in a safe and efficient manner. For their part, all workers must apply what they have learned to work safely. Workers are required to attend and participate in hazard assessments, safety meetings, daily tailgate meetings, and the safety observation card (SOC) program. CPES will also support and facilitate the establishment and operation of workplace OHS committees, where required by regulation or where implemented by management.

**3.0 Objective**

This standard provides guidance to supervision and workers on training, communication, and workplace OHS committees, which all help enable workers to perform their work safely, reinforce existing safety policies, and strengthen CPES's safe work culture.

**3.1 Key Policy Statements**

- Workers that are new to the industry and/or to CPES are at a higher risk for workplace incidents and injuries.
- Mentoring and close supervision is an important risk mitigation for new workers.
- CPES will provide the training required for workers to be able to perform their assigned work tasks safely.
- Supervisors are responsible to ensure that workers have the right combination of training, knowledge, and experience (i.e. competence) to perform their assigned work tasks safely.
- CPES leadership is responsible to communicate key information to workers, such as that identified within the HIAC or SOC programs, HSE trends, safety alerts, lessons learned, etc.
- CPES will support/facilitate the establishment and operation of workplace OHS committees, where required by regulation or where implemented by management.

APPROVED:

  
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Aaron Karpan, President



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Managers/Supervisors/Foremen

Supervisors are vested with special duties concerning the training of workers. Supervisors have the primary responsibility for implementing the HSEMS as it relates directly to the worker. Supervisors are responsible for being familiar with health and safety hazards to which workers are exposed, how to recognize them, the potential effects of these hazards, rules and procedures for maintaining a safe workplace and for training workers in the tasks to be performed. Supervisors shall convey this information to the workers at the workplace and shall investigate incidents according to the incident investigation policies contained in this manual.

Management will periodically review health and safety activities, incident trends, and for the determination of necessary remedial courses of action. Action items will be then communicated to all workers.

Supervisors will:

- Review with worker(s) the Codes of Practice, Safe Work Practices, and Safe Job Procedures applicable to the work scope, and how following these Safe Work Practices/Procedures helps protect against loss.
- Train workers on how to use and maintain their basic personal protective equipment (PPE) as well as any specialized PPE.
- Train workers on what to do in case of emergencies occurring in the workplace.
- Mentor, or assign an appropriately experienced worker to mentor new worker(s).
- Ensure that workers under their supervision are competent for the duties that are assigned to them.
- Verify all relevant documentation that proves the employee meets the minimum requirement for the role (hired or promoted) outlined in the job description and/or Canadian Plains Energy Services Group Training Matrix (resume, safety tickets, Journeyperson/Apprenticeship ticket, degree/diploma, etc.).
- Inform workers of their rights, including the right to refuse unsafe work, and that all work refusals must immediately be reported to the worker's immediate supervisor.

Employee Roles and Organizational Structure

Canadian Plains Energy Services Group's Corporate and Business Unit Management team structure is outlined on the Canadian Plains Energy Services Organizational Chart which is undated on a regular basis and is available on the Canadian Plains Energy Services Intranet Site.

Canadian Plains Energy Services' field teams perform a large variety of tasks and jobs which require many different types of professionals to complete. Canadian Plains Energy Services has identified the following employee roles in our Training Matrix:

- Accountant
- Administrator, (Accounting, Infrastructure, Office, Payroll, Proposals, Quality Control, HR Systems, Fleet)
- Controller, (Document, Project, Project)
- Coordinator, (HSE, HR, Material & Equipment, Project, Proposals, Quality Control)
- Custodian
- Electrical Superintendent
- Electrician, Journeyperson
- Electrician, Apprentice
- Foreman, (Crew, Labour, Shop, Trade)
- Foreman, General
- Fusion Technician
- Health Safety and Environment Advisor
- Health Safety and Environment Coordinator

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- Heavy Equipment Mechanic
- Heavy Equipment Mechanic, Journeyperson
- Heavy Equipment Mechanic, Apprentice
- Inspector, Quality Control
- Instrument Technician, Journeyperson
- Instrument Technician, Apprentice
- Ironworker, Journeyman
- Ironworker, Apprentice
- Carpenter, Journeyperson
- Carpenter, Apprentice
- Instrument Technician, Journeyperson
- Instrument Technician, Apprentice
- Millwright, Journeyperson
- Millwright, Apprentice
- Crane Operator, Journeyperson
- Crane Operator, Apprentice
- Labourer, Entry Level
- Labourer, Intermediate
- Labourer, Skilled
- Management, Trainee
- Millwright, Journeyperson
- Millwright, Apprentice
- Operator, Heavy Equipment
- Operator, Light Equipment
- Pipefitter, Journeyman
- Pipefitter, Apprentice
- Plumber, Journeyperson
- Plumber, Apprentice
- Receptionist
- Scaffolder, Journeyman
- Scaffolder, Apprentice
- Shipper/Receiver
- Student, Summer
- Superintendent, (Construction, Field, Project)
- Supervisor, Quality
- Surveyor
- Welder, Journeyman
- Welder, Apprentice

The Canadian Plains Energy Services Group Training Matrix outlines the minimum required training for all of the identified Employee Types.

### Safety Meetings

Safety meetings are the primary vehicle for ongoing safety awareness. Therefore, they must be held frequently, and on a scheduled basis to ensure workers are properly informed with respect to issues past, present and future, relative to safety in their workplace.

- Pre-job Meeting – should be scheduled in advance of a job/project start, to discuss safety issues and concerns before work begins. The Pre-Job Safety Meeting form (CF-S-03) can serve as a guide for topics that should be discussed.
- Daily Tailgate Meetings – are to be held daily and before work begins. These meetings should generally involve the entire crew, including any subcontract workers. The supervisor should plan and lead the daily tailgate meetings; the primary purpose of which is to inform each crew member of the planned work activities for the day, to review the general hazards and controls, the risk associated with concurrent activities, and to review the safe work permit (where applicable). Following the daily tailgate meeting, individual crews/work teams are responsible to conduct a more specific hazard assessment for their specific work tasks using Canadian Plains Energy Services' Hazard Assessment, Identification, Control (HIAC) process and form (CF-S-01).
- General Safety Meetings - General Safety Meetings are to be held once per month in each business unit, and on a pre-determined frequency as defined in the project plan for specific jobs/projects (e.g., weekly, by shift, etc.). All Canadian Plains Energy Services workers are expected to attend. These meetings are used to share information relative to past performance, incident investigation results, and corrective action plans, upcoming work scopes, safe work practices/procedures, rules, regulations, industry bulletins/alerts, new initiatives and/or opportunities to improve safety performance, etc. The General Safety Meeting form (CF-S-05) will serve as a guide when preparing for general safety meetings.

### Orientation

All new workers including new hires, independent service providers, and sub-contractors will receive an orientation prior to beginning any work on a Canadian Plains Energy Services jobsite. The orientation facilitator will adhere to the following process of orientating new workers:

- Ensure they complete the Canadian Plains Energy Services general safety orientation (on-line)
- Canadian Plains Energy Services Group Orientation includes a review of the employee's rights and process to refuse work
- Completion of HR department Hire on package

New/short service (less than 6 months industry experience) workers will be visually identified and their status as a new worker is to be communicated to the sites Prime Contractor/Client (as required) following site orientation.

### Site Specific Orientation

Following the general safety orientation, a site-specific orientation should be conducted with a review of the site hazards, emergency procedures (e.g., muster point, contact numbers, etc.), emergency equipment (e.g., first aid equipment, fire extinguishers, AED's, etc.), designated smoking area, washrooms, parking, etc.

### Short Term Service Provider – Site Specific Orientation

When it is necessary for a 3<sup>rd</sup> party service provider worker to be on a Canadian Plains Energy Services job site for a short period of time (e.g., truck driver making a delivery to site), and it is not practical to conduct a full Canadian Plains Energy Services orientation, then the 3<sup>rd</sup> party service provider worker(s) will be given a Short-term Service Provider Site-specific Orientation (CF-S-24).



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Safety Observation Card (SOC) Program

The SOC is a proactive process designed to identify and document near misses, safe and/or at-risk conditions, actions, or behaviors in the workplace. All workers, sub-contractors, supervisors, and management are required to participate by submitting SOCs and turning them into site supervision.

This process allows workers to observe and discuss proper or improper practices and identifies the corrective action to be taken if necessary.

SOCs are to be reviewed at tailgate and safety meetings on a regular basis, as a means of sharing the observation, increasing awareness, and communicating corrective actions required (if any).

Safety Training

To ensure that workers are well informed and trained with respect to the company, client, and industry safety knowledge and expectations, workers shall receive:

- Canadian Plains Energy Services orientation at the time of hire on and/or prior to accessing any Canadian Plains Energy Services worksite.
- Canadian Plains Energy Services site-specific orientation.
- Client orientation (if required) prior to accessing any client worksite.
- Training as defined in the company Worker Training Matrix.

General Training Procedures

On-the-job training should follow the Tell → Show → Do → Give Feedback model, which helps turn new workers into safe, skilled, competent employees. Additional information on Canadian Plains Energy Services' mentoring program follows in Section 8.2.

The following steps outline generally how to train and mentor workers:

1. Prepare the New Worker
  - Explain the job tasks in detail and the reason(s) for doing them that way
  - Explain the safety precautions in detail and the required PPE
  - Provide and review relevant safe work practices or safe job procedures
  - Encourage questions to assess worker's understanding
2. Demonstrate and Describe
  - Demonstrate the procedure
  - Include all safety precautions during the normal sequence of tasks
  - Have the worker perform the procedure until they can do it safely and as required
  - Repeat any steps that are poorly understood or performed incorrectly
3. Observe the Worker
  - When you feel the worker is ready, have them perform the task alone
  - Ask the worker follow-up questions to ensure knowledge and understanding
  - Praise work done well
  - Document observations, and progress made on specific procedures and tasks
4. Check Progress
  - Conduct unscheduled checks, observations of worker
  - Correct unsafe work habits and shortcuts
  - Monitor worker to ensure standards are maintained
  - Document observations made

**Section 8.2 New Workers**

Untrained or inexperienced workers are one of the highest risk groups in the workplace. Studies have shown that workers with less than 6 months' experience are 3 times more likely to be injured than those with a year or more experience and workers under the age of 25 are 33% more likely to be injured on the job than older workers. "New workers" may be young or old, or working in a new industry. CPES identifies three classifications of new workers:

- Green worker – A worker new to the industry within the last 6 months.
- Short service worker - A worker with less than 6 months' experience with their present employer, or in their present role.
- Young worker – A worker under the age of 25.

CPES will ensure workers have the necessary training, qualifications and experience for the job they are assigned. Strike will inform workers of the safety hazards of the job, provide the necessary safety equipment and training.

Green workers will be identified and be under direct supervision by a competent worker until they have demonstrated competency for the work tasks. This includes competency in the use of personal protective equipment, tools, machinery and any equipment to be used.

The key elements of new worker management are:

- Identification
- HSE Orientation
- Mentorship
- Observation Program (SOC)
- HSE Competency
- Number of new workers per worksite/contractor
- Green workers may not work alone

**Identification**

All green workers will be required to wear a green hard hat to identify them as such to their supervisor, mentor(s), and coworkers.

**HSE Orientation**

New workers and contractors need a comprehensive HSE Orientation to our industry.

**Mentorship**

All green workers should be assigned a mentor who meets the following criteria:

- Is responsible and can be relied on to provide enhanced, close supervision for the new worker
- Is an experienced, competent worker and role model
- Is willing to share knowledge
- Is willing to teach, coach, and guide new workers
- Will ensure new workers are not exposed to hazards beyond their current competency

**HSE Competency**

Before a worker can be moved off of the green worker status, the worker must demonstrate HSE competency for the job (as per CF-S-30 Green Worker Mentoring/Competency Checklist). Short service workers must be assessed for HSE competency prior to removal of short service worker status.



Sub-Contractors

Sub-contractors are encouraged to develop and apply their own new worker management guideline provided they include the elements outlined. If a contractor does not have a guideline, the job supervisor will explain the requirements to the contractor, preferably prior to arrival on site.

Allowable Green Worker Staffing

As part of the pre-job planning process, Strike and contractors should identify the number of green workers proposed for the job to the Manager, Project Manager, and/or Superintendent. A green worker should always be paired with an experienced worker. Strike must ensure that our plan to manage green workers on a client site also aligns with their specific expectations/guidelines (usually 25% maximum green workers).

**References**

- British Columbia OHS Act, Code & Regulations Part 3 – Rights & Responsibilities
- Saskatchewan OHS Regulations Part 3 – General Duties
- Alberta OHS Regulations Part 1 – Section 13, 14, and 15
- Manitoba Health and Safety Act, Section 4, 4.1

**Applicable Forms**

- CF-S-03 Pre-Job Safety Meeting
- CF-S-04 Daily Tailgate Meeting
- CF-S-05 General Safety Meeting
- CF-S-08 Safety Observation Card
- CF-S-24 Short Term Service Provider-Site Specific Orientation
- CF-S-29 Controlled Product Checklist
- CF-S-30 Green Worker Mentoring/Competency Checklist
- CF-S-30B Competency Checklist – Aerial Work Platform
- CF-S-30C Competency Checklist – Zoom Boom/Telehandler
- CF-S-30D Competency Checklist – Side Boom/Pipelayer
- CF-S-30E Competency Checklist - Dozer
- CF-S-30F Competency Checklist – Excavator
- CF-S-30G Competency Checklist – Picker
- CF-S-30H Competency Checklist – Skidsteer



Canadian Plains Energy Services (CPES) is responsible to verify that all its workers are competent for work which they perform, without direct supervision. Traditionally, being trained has often been considered the same as being competent. However, training should be considered only one of the components in developing competency in a task or position.

While there are many possible interpretations of competency, CPES has chosen to adopt that of Alberta OH&S which defines a competent worker as one who is:

- (a) adequately qualified – the worker has some type of qualification, usually earned through a formal education program, training course, etc., or a combination of education and practical experience. The employer should be able to justify the basis on which a worker is considered to be “adequately qualified.”
- (b) suitably trained – the worker must have training that is appropriate to the tasks, equipment, etc., that will be performed or used. The employer is responsible for evaluating and deciding if a worker is suitably trained. Note that for some types of work, there may not be formal education or training courses available, and training would consist of on the job or other training.
- (c) with sufficient experience to safely perform work without supervision or with only a minimal degree of supervision – determining whether a worker has sufficient experience to safely perform work is the employer’s responsibility. A worker’s qualifications, training and experience are no guarantee that work will be performed safely. The employer should be able to justify the basis on which a worker is considered to have “sufficient experience.”

**When seeking to deem a worker competent CPES will consider the following criteria:**

### **Qualification Verification**

Verification of qualifications can be done in various ways. Examples are detailed below for designated occupations.

- a) Confirm a worker holds a trade certificate, apprenticeship, or enrolled student of a recognized trade program. Where relevant this may also include the completion of a recognized post-secondary degree or certificate.
- b) Membership in industry professional associations or achieved designations (i.e. P.Eng., PMP, CSRP, NCSO, CWB, NACE).
- c) For non-designated occupations: review resumes, confirm references, and refer to their profile in CPES’s learning management system/tracking database for previous internal training with the company.
- d) Task-specific training and qualification should be verified at hire (CWB Certifications, Grade B-Pressure Welding, operator training, etc.).



### **Training Verification**

Training is verified by confirming that workers have completed the appropriate and/or required training, examples of which are detailed below:

- a) Orientation: New worker orientations, (both CPES and client), should be confirmed through a quiz or exam. Review applicable safe work practices & procedures and hazard assessments through the site-specific orientation.
- b) General Training: Procedures, Practices and Assessments also need to be reviewed on a regular basis. (Usually through Safety, Tailgate, and Pre-task Meetings)
- c) Task Specific Training: On the job training based on the risk assessment and/or unusual work procedures or newly assigned tasks. i.e. working near power lines, use of hand tools, use of taglines etc.
- d) External Education: This includes training provided by third party training organizations, accredited educational institutes such as technical colleges and Apprenticeship and Industry Training. Samples of the training courses or programs may include but are not limited to:
  - Leadership for Safety Excellence (Alberta Construction Safety Association)
  - Safety Essentials for Supervisors and Managers - SEFSAM, (Global Centre for Leadership & Safety Excellence)
  - Task Specific Training (Various Providers) (e.g. fall protection, aerial work platform, WHMIS, confine space entry/monitor, transportation of dangerous goods, flag person, defensive driving, etc.)
  - Construction Safety (Alberta Construction Safety Association, Energy Safety Canada, etc.)

Throughout industry, there are many suppliers of training that deliver both task specific and general industry training. CPES has developed a training matrix by position which identifies the necessary training; this has been integrated into CPES's learning management system and will be assigned to the worker according to their position at hire. Task specific training will be identified and tracked at the business unit or job site level.

Not all training is formal and/or done in a classroom. Many of the tools and process at CPES will require the worker to be trained on the job. If a worker is unfamiliar with a process or a tool, a CPES Supervisor or their designate will review the process with the worker. When completing on the job training, CPES SWP, SJP, COP and manufacturer's specifications can all provide additional guidance and reference.

### **Experience Verification**

Experience verification is one of the more difficult components of competency to satisfy. However, it can be achieved by a few simple questions at time of hire. Does the worker possess the physical capabilities necessary? Is the worker familiar with job scope? Is the worker familiar with the tasks required? Has the worker conducted work at the assigned site in the past, etc.? Has the worker completed similar work for CPES or other organizations in the past?

During the hiring process, a CPES Supervisor experienced in the tasks required should be given the opportunity to verify the applicant has enough relevant experience. In the case of specialized positions (QC, HSE, etc.) input should be sought from the relevant corporate group or another experienced worker.

Workers who do not yet possess the experience to meet the competency requirement should be enrolled in the CPES "Green Hand" mentorship process (see section 8.2 New Workers).

### **Competency Assessment Tools**

Competency assessments for the operation of equipment and vehicles will be assessed and documented using the relevant CPES competency assessment form. This assessment will also be used to verify appropriate on the job worker training, in cases where a formal third-party ticket is not required (i.e. skidsteer, side boom). Assessments should be completed utilizing the appropriate CPES CF-S-30 form.

When selecting who will deem workers competent, several factors will be considered by CPES. Generally, the CPES Site Supervisor or another competent worker will deem workers competent. When selecting a delegate, consideration should be made for the assessor's own level of experience and competency. Normally the most experienced worker available in a particular process should be designated to assess a worker's competency.

It should be noted that assessors are only assessing a set of skills at a given point in time. It is not possible to verify that a worker will never make a mistake in the operation of the equipment, or completion of the work scope. The assessor is verifying that they feel the worker is competent based on what they have seen. The assessor is not responsible for future mistakes (willful or otherwise) made by the worker.

Open communication will be maintained on all CPES work sites, workers are encouraged to be honest and open regarding their experience level with assigned tasks or tools. Supervisors will monitor workers for signs of inexperience and mentor as required. Workers who are not yet ready to be deemed competent, may continue to perform the task, provided they are under the supervision of another worker who has been deemed competent, and typically lower-risk tasks or environments.

The safety observation program (behaviour-based safety) can also be used informally for observing workers and providing coaching and feedback by supervisors and assigned workers, to help develop competency further.

### **Record Keeping - Documentation**

Accurate documentation of worker competency must be retained. Keeping complete and accurate records helps the company:

- Identify areas for learning and development required on the project and within the organization.
- Identify the programs created and actions needed to improve worker competency.
- Demonstrates due diligence on the part of CPES, its supervisors and workers.

### **Competency Reassessment**

Competency can decay over time when tasks are not frequently completed or when other factors are involved (new equipment is introduced, work is moved to a more challenging work environment, etc.). CPES will reassess competency as required based on the observations of site supervision.



**Applicable Forms**

- CF-S-03 Pre-Job Safety Meeting
- CF-S-04 Daily Tailgate Meeting
- CF-S-05 General Safety Meeting
- CF-S-08 Safety Observation Card
- CF-S-24 Short Term Service Provider-Site Specific Orientation
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- CF-S-30G Competency Checklist – Picker
- CF-S-30H Competency Checklist – Skidsteer

The duties of committees are defined in Provincial OH&S legislation. The requirement for a committee and their specific duties may vary by the province in which work is being conducted. See SWP 57 - Workplace OHS Committees for general guidelines on committee duties and responsibilities.

The following outlines the responsibilities, structure, documentation, training, and specific provincial requirements for Workplace OHS Committees.

### **RESPONSIBILITIES**

Management Responsibilities to the Committee:

- Support the committee
- Ensure the committee members receive training relevant to their committee duties
- Work with the committee to develop and implement solutions to improve worker health and safety (this doesn't mean that the employer must adopt every suggestion; it should be a consultative and cooperative process)
- Provide committee with equipment and meeting space to conduct committee meetings

Supervisor Responsibilities to the Committee:

- Cooperate with the committee
- Bring significant health and safety concerns forward to the committee

Worker Responsibilities to the Committee:

- Bring health and safety concerns forward to their supervisor/management first; if they are significant concerns or they are not satisfactorily resolved, they should be brought forward to the committee
- Cooperate with the committee
- Assist the committee as required (e.g., hazard identification, inspections, etc.)

Committee Member Responsibilities:

- Identify situations that may be unhealthy or unsafe to workers
- Consult with workers and the employer on issues related to occupational health and safety and environment
- Promote the health & safety policy and program and make recommendations for improvement where required
- Participate in workplace inspections as per regulatory and CPES requirements
- Actively participate in and review incident investigations according to regulatory and CPES requirements

### **COMMITTEE STRUCTURE**

- Worker and employer representation should have a mix of experience and expertise
- At least half the members must be workers not involved in management
- Names of committee members must be posted in the workplace
- Each committee must have two co-chairs, one representing management, and one representing workers
- It is good practice to train and prepare alternate co-chairs and member for continuity
- Co-chairs are responsible to plan the meetings and prepare the agenda. Assistance may be provided by other members
- Committees will develop their own terms of reference that follow the guidance set out by SWP 57 – Committee and the applicable provincial requirements

### **MINUTES/DOCUMENTATION**

- Before the meeting, a minute taker should be appointed, who should summarize the discussion following the meeting and distribute to the committee members for review
- Meeting minutes and documentation are to be centrally filed (S:\Safety\HSE Committees) and posted in the workplace



**QUORUM**

Quorum is required at committee meetings for the purposes of votes and decision making. A quorum means at least:

- Half of all committee members must be workers
- Half or more of the members present must be workers
- At least one employer member must be present

**COMMITTEE TRAINING**

- CPES will ensure that committee members and worker representatives are trained and competent to fulfill their duties.
- A member for a Health and Safety committee is entitled to be paid for:
  - Attending committee meetings,
  - Participating in any required committee training,
  - Preparing for meetings (if necessary), and
  - Fulfilling any other functions and duties of the committee