**Instructions to Evaluators:**

This form is to be completed when evaluating potential Contracting Employers to fulfill a Prime Contractor role.

SCHEDULE

These reviews must be completed in a timely manner so that the overall process goals are met. The proposal may identify a timeline for review. This includes any calling of references and final review information being sent back to the procurement department. Dates for reviews are being tracked and will be flagged by procurement or the project manager when deadlines are being missed.

PROCESS

When the review is completed, and all comments tracked then send information back to procurement for final evaluation summary. Reviewers may need to contact proponents for clarification or additional information.

REVIEW DOCUMENTATION

It is important for this review that ALL DEFICIENT INFORMATION IS NOTED in each section, with as much detail as may be required for a vendor to understand where/how a submission would need to be improved to be able to resubmit in the future.

All comments should be written in a manner that information from the comments can be returned to the proponent to understand the rationale behind the decision. This information may be used in the notification letter back to the proponent (with rejection) or in a debrief if requested by the proponent. The Reviewer may be asked to be part of any debrief with an unsuccessful proponent so clear documentation of the results with specific rationale, in the comments section, for a ‘‘failure’’ is imperative for this review process.

For the safety review, all required documentation will be reviewed against legislation applicable to the activity and jurisdiction to show the appropriate safety competencies of the Proponents safety processes and procedures related to the role of Prime Contractor.

Approval through the pre-qualification for this safety schedule does not eliminate the project/site-specific safety plans that will be required to be completed by The Prime Contractor for Safety that may be required to be reviewed/approved by the Owner / Employer prior to starting of work on-site, nor any other requirement of the Prime Contractor for Safety under the legislation.

|  |  |  |
| --- | --- | --- |
| Overall Safety Review | Pass | Fail |
| All Safety Information Complete & Acceptable. Proponent Recommended for Passing of the Safety Review. |  |  |
|  | Category Reviewed: | Safety |
|  | Proponent Name: |  |
|  | Name of Reviewer: |  |
|  | Title of Reviewer: |  |
|  | Date of Review: |  |
| Required Documentation: | Pass | Fail |
| All Documents Complete and Valid (non-expired) |  |  |
|  | Organization Health and Safety Manual |  |  |
|  | Contractor Health and Safety Management Program |  |  |
|  | Sample/Previous Example of Site Safety Plan |  |  |
|  | Organization chart indicating reporting structure of safety personnel |  |  |
|  | Current COR/SECOR (or equivalent) |  |  |
|  | WCB Letter in Good Standing |  |  |
|  | Completed Project Experience Form – with specific reference to projects where the Organization was Prime Contractor for Safety.  |  |  |

|  |  |
| --- | --- |
|  | Required Documentation Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Hazard Assessment: | Pass | Fail |
| All Hazard Assessment Information Complete and AcceptableSpecifically addresses the Frequency, Participation of Workers, adherence to Hierarchy of Controls. Supporting Documentation may include Hazard Identification, Assessment, and Control Procedures, related forms/templates. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Hazard Assessment Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Project Orientation: | Pass | Fail |
| All Project Orientation Information Complete and AcceptableSpecifically addresses the Communication of Safety Expectations and Compliance to All Workers, Sub-contractors, and visitors at the Work site. Supporting Documentation may include Orientation Sign-off Forms, Orientation Packages. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Project Orientation Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Work site Inspections: | Pass | Fail |
| All Work site Inspections Information Complete and AcceptableSpecifically addresses the Frequency, Participation, and Identification of Corrective Actions and Controls, follow up on Corrective Actions, and Sharing Results to Workers. Supporting Documentation may include Work site Inspection Templates, Schedule/Tracking of Inspections Forms. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Work site Inspections Information Comments |
|  | List all Deficiencies (If any): |  |

|  |  |  |
| --- | --- | --- |
| Safety Meetings: | Pass | Fail |
| All Safety Meetings Information Complete and AcceptableSpecifically address the Frequency and Topics Covered in Regular Meetings, Attendance, and Participation Requirements. Supporting Documentation may include Templates for Recording Meeting Notes, Examples of Safety Meeting Agendas. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Safety Meetings Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Incident Reporting and Investigation: | Pass | Fail |
| All Incident Reporting and Investigation Information Complete and AcceptableSpecifically address Reporting and Investigation Requirements, Requirement for Root Cause Analysis, follow through on Corrective Actions, and Sharing Results with Workers. Supporting Documentation may include templates for Incident Reports, Follow-up Documentation for Investigation Work, Tools for Documenting Findings, Procedures to Share Information with Affected workers, Documentation for Implementing Corrective Action. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Incident Reporting and Investigation Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Emergency Preparedness and Response: | Pass | Fail |
| All Emergency Preparedness and Response Information Complete and AcceptableSpecifically address How Potential Emergencies will be Identified and Responded to, How Equipment, Training, Roles of Workers/First Responders, Consideration of Emergency Events that May Occur on City Work sites. Supporting Documentation may include Sample Emergency Response Plans. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Emergency Preparedness and Response Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Fitness for Duty / Fatigue Management: | Pass | Fail |
| All Fitness for Duty / Fatigue Management Information Complete and AcceptableSpecifically address Organization Drug and Alcohol Response, Hours of work, Management of Overtime, Professional Driver Requirements. Supporting Documentation for this section may include tracking of hours worked/distances driven and/or limitation procedures for being on duty/driving; employee communications regarding Alberta labour standards for limiting of hours and hours between shifts etc. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Fitness for Duty / Fatigue Management Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Rules for Non-Compliance: | Pass | Fail |
| All Rules for Non-Compliance Information Complete and AcceptableSpecifically, address How the Organization Responds to Safety Violations. Supporting Documentation may include Progressive Disciplinary measures. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Rules for Non-Compliance Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Personal Protective Equipment (PPE): | Pass | Fail |
| All Personal Protective Equipment (PPE) Information Complete and AcceptableSpecifically, address Selection for the type of Work/Work site, Use, and Maintenance. Supporting Documentation may include a Checklist for Type of work, Specialized PPE lists for Tasks. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Personal Protective Equipment (PPE) Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Tools and Equipment: | Pass | Fail |
| All Tools and Equipment Information Complete and AcceptableSpecifically, address Use and Maintenance for Tools and Equipment. Supporting Documentation may include Checklist for Inspection and Maintenance, Template for Inspection Schedule. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Tools and Equipment Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Controlled Products Management: | Pass | Fail |
| All Controlled Products Management Information Complete and AcceptableSpecifically address Compliance with Workplace Hazardous Materials Information System (WHMIS), How Safety Data Sheets (SDS) are made available to all Employees, Use of Globally Harmonized System (GHS). Supporting Documentation may include SDS Communication Methods, GHS Information, Training Process for Controlled Products on the Work site. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Controlled Products Management Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Right to Refuse Dangerous Work: | Pass | Fail |
| All Right to Refuse Dangerous Work Information Complete and AcceptableSpecifically address Communication, Recording, Managing, and Responding to the Reporting of Unsafe Work. Supporting Documentation for this section may include a Template for a recording of refused work (maybe through the incident management process). |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |

|  |  |
| --- | --- |
|  | Right to Refuse Dangerous Work Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| OHS Oversight on Prime Contractor for Safety Projects: | Pass | Fail |
| All OHS Oversight Information Complete and AcceptableSpecifically, address Requirements when Overseeing Other Employers. Supporting Documentation for this section MUST include a Sample Site Safety Plan. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |
| Sample Site Safety Plan Complete and Acceptable |  |  |
|  | Contracting Employer management and representative sign-off |  |  |
|  | Hazard identification, assessment, and controlFrequency of assessmentConsider potential emergencies that may result from hazardsWorking aloneWorkplace violenceFatigue management / ImpairmentWHMIS / GHSMaintenance / Preventative maintenanceWork procedures (administrative controls)Personal protective equipment (PPE)Worker involvementAdherence to hazard control |  |  |
|  | Site inspectionFrequencyParticipationRecord managementFollow-up: Corrective action completionFollow-up: Communication to affected employees |  |  |
|  | Incident managementParticipationRecord managementFollow-up: Corrective action completionFollow-up: Communication to affected employees |  |  |
|  | Project orientation |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Meetings (project/site/trade/other)FrequencyParticipationRecord managementFollow-up: Corrective action completionFollow-up: Communication to affected employees |  |  |
|  | Record management |  |  |

|  |  |
| --- | --- |
|  | OHS Oversight/Sample Site Safety Plan Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Management of Sub-contractors: | Pass | Fail |
| All Management of Sub-contractors Information Complete and AcceptableSpecifically address Communication of Safety Performance and Expectations of Sub-contractors, Process for Review of and Documentation of Safety Performance of Sub-contractors at the Work site, during and at the conclusion of work. Supporting Documentation may include Representative Sign-off Forms, Clarification Documents of communication for Sub-contractors to bring their work procedures for specialized tasks, Templates for Recording Sub-contractor Safety Objectives and Performance, Project Monitoring Documentation, and Post-Project Review of Performance Templates. |  |  |
|  | Policy/Standard |  |  |
|  | Process/Procedure |  |  |
|  | Tool(s) |  |  |
|  | Requirement of COR/SECOR of Sub-contractors or how to ensure safety management system requirements being met by Sub-contractor teams acceptable |  |  |
|  | Requirement of ‘Letter in Good Standing’ from Workers Compensation Board – Alberta (WCB-Alberta) for Sub-contractors before commencing work or provide WCB coverage for Sub-contractors |  |  |

|  |  |
| --- | --- |
|  | Management of Sub-contractors Information Comments |
|  | List all Deficiencies (if any): |  |

|  |  |  |
| --- | --- | --- |
| Project Experience Information: | Pass | Fail |
| Project Experience Information Complete and AcceptableSpecific reference to projects where the Organization was Prime Contractor for Safety. The projects shown represent a good indication of project safety success on these 3 previous projects. |  |  |
|  | Project 1 – Project information complete and the project is relevant/acceptable |  |  |
|  | Project 1 – Owner reference is acceptable |  |  |
|  | Project 1 – Consultant reference is acceptable |  |  |

|  |  |
| --- | --- |
|  | Project 1 Comments |
|  | List all deficiencies and comments (if any): |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Project 2 – Project information complete and the project is relevant/acceptable |  |  |
|  | Project 2 – Owner reference is acceptable |  |  |
|  | Project 2 – Consultant reference is acceptable |  |  |

|  |  |
| --- | --- |
|  | Project 2 Comments |
|  | List all deficiencies and comments (if any): |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Project 3 – Project information complete and the project is relevant/acceptable |  |  |
|  | Project 3 – Owner reference is acceptable |  |  |
|  | Project 3 – Consultant reference is acceptable |  |  |

|  |  |
| --- | --- |
|  | Project 3 Comments |
|  | List all deficiencies and comments (if any): |  |