

# Contractor Handbook and Orientation Checklist

Contractor  
Safety  
Management

Version 2  
January 4, 2021

**Edison Representatives and Contractors are responsible for collaborating effectively to drive a common understanding of safety awareness, hazard mitigation, oversight and reporting requirements before a Contractor begins work for Southern California Edison (SCE). This supports our goal of eliminating all serious injuries and fatalities.**

## RFP INSTRUCTIONS

- Step 1:** The Edison Representative shall provide a copy of the Contractor Handbook and Orientation Checklist (CHOC), the SCE Contractor Hazard Assessment and Safety Plan (HASP) and the Handbook for Contractors to all bidders in the RFP for review.
- Step 2:** All bidders shall review the Handbook for Contractors and confirm their understanding and agreement by completely filling out the CHOC and signing it. Safety Tier 1 contractors must also follow the HASP instructions.

## ORIENTATION INSTRUCTIONS:

- Step 1:** The Edison Representative and Contractor Representative shall review each section of the Health and Safety (HS) Handbook for Contractors and confirm understanding by checking the box associated with each section.
- Step 2:** The Edison Representative and Contractor Representative shall sign and date this form to confirm the review of each item is complete and to document a mutual understanding regarding what is required to safely perform work at SCE.
- Step 3:** Safety Tier 1 Contractors shall upload the signed CHOC to the TPA along with the signed HASP.
- Step 4:** Contractors shall ensure all Prime and subcontractor workers are trained to these requirements.
- Step 5:** Safety Tier 1 Contractors shall ensure a signed copy (electronic and/or hard copy) of this CHOC is retained by all crews while conducting Safety Tier 1 work for SCE (along with the Contractor's tailboard form, HASP and reference safety documents).

<b>Project Name:</b>		<b>Compliance Line clearing and removals. Heavy tree removal programs. Fire cleanup.</b>		<b>Edison Representative:</b>	David Guzman
<b>Purchase Order #:</b>		CW2251089, CW2270776		<b>Project Location:</b>	Zones 2, 7, 9, and 10 plus other zones as needed
<b>Source Work? (Y/N)</b>		Y		<b>Higher Risk (HR) Work? (Y/N)</b>	Y
<b>Anticipated Start Date:</b>	1/1/2020	<b>Anticipated Completion Date:</b>	12/31/2023	<b>Contractor Company:</b>	Utility Tree Service LLC
<b>Contractor Representative</b>				<b>Contractor's Safety Professional</b>	
<b>Name:</b>	Ryan Myers			<b>Name:</b>	Joe Ramirez
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**Safety Tier 1 and Tier 2 Work:** Review and obtain agreement for Safety Tier 1 and Tier 2 work on the following requirements contained in the HS Handbook for Contractors. Note: **items in bold are required for Safety Tier 1 Contractors only.** All other items are required for both Safety Tier 1 and Safety Tier 2 Contractors.

<input checked="" type="checkbox"/>	<p>Introduction</p> <ul style="list-style-type: none"> <li>The purpose of the Handbook for Contractors</li> <li>SCE's Environmental, Health, and Safety Policy</li> <li>Safety Performance Policy</li> <li>Principles of Operation</li> <li>Contractor Safety Management Standard</li> </ul>
<input checked="" type="checkbox"/>	<p>General Expectations</p> <ul style="list-style-type: none"> <li>Applicability</li> <li><b>Safety Qualification Requirements for Safety Tier 1 Contractors</b></li> <li>Expectations for Safety Tier 1 and Tier 2 Contractors</li> <li><b>Expectations for Safety Tier 1 Contractors</b></li> <li><b>Expectations for Safety Tier 1 High Risk (HR) Contractors</b></li> <li><b>Subcontractor Management Responsibilities and Expectations</b></li> <li>SCE Stop Work Authorization and Inspection</li> </ul>
<input checked="" type="checkbox"/>	Procurement of Safety Tier 1 and Safety Tier 2 Contracts
<input checked="" type="checkbox"/>	Contractor Orientation
<input checked="" type="checkbox"/>	Tailboard Requirement
<input checked="" type="checkbox"/>	Emergency Response
<input checked="" type="checkbox"/>	Incident Reporting
<input checked="" type="checkbox"/>	Additional Reporting Requirements
<input checked="" type="checkbox"/>	<p>General Health and Safety Requirements</p> <ul style="list-style-type: none"> <li>Confined Space Entry</li> <li>Fall Protection</li> <li>Fire Prevention</li> <li>Wildland Fire Prevention</li> <li>Hazard Communication</li> <li>Heat Illness Prevention</li> <li>Hot Work</li> <li>Housekeeping Cleanup</li> <li>Industrial Hygiene                             <ul style="list-style-type: none"> <li>Asbestos</li> <li>Lead</li> <li>Noise</li> <li>Non-Ionizing Radiation Except EMF</li> <li>Potential Radio Frequency Energy Exposures at SCE Facilities</li> </ul> </li> <li>Valley Fever</li> <li>Hazardous Energy Control</li> <li>Trenching and Excavation</li> <li>Use and Operation of SCE Facilities, Materials, Equipment, and Vehicles</li> <li>Work Area Protection and Traffic Control</li> <li>Electrical Work</li> <li><b>Substation Construction and Maintenance</b></li> <li><b>Vegetation Management Work</b></li> </ul>

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## LIST OF ACTIVE SUBCONTRACTORS AND ORIENTATION ACKNOWLEDGEMENT

Contractor shall maintain an active list all proposed subcontractors and their orientation dates by filling out the table below. (When filling this out in response to an RFP, leave the orientation column blank).


COMPANY NAME	SCOPE	SAFETY TIER	ISN GRADE	REPRESENTATIVE NAME / PHONE	ORIENTATION DATE
VM Utility Services LLC	Veg compliance line clearing and wood and palm removals, Also Heavy tree removals programs	1	A	Eric Stall 858-583-8776	03-24-2021
Pacific Coast Tree Experts	Veg compliance line clearing and wood and palm removals, Also Heavy tree removals programs	1	A	Armando Valdez 805-506-1211	03-24-2021
National Waste Management Co	Veg compliance line clearing and wood and palm removals, Also Heavy tree removals programs	1	A	Chris Roberts 559-706-7684	5/6/2021
AAA Tree Service LLC	Heavy tree removals programs	1	B	Jeff Taylor 909-973-6377	10/11/21
Drake Traffic	Traffic control company	1	B	Justine Bush 657- 284 - 5856	11/22/21

## PRIME CONTRACTOR WORKER ORIENTATION AND MANAGEMENT

Contractors shall use the spaces below to **fully** explain the onboarding, continuous training and oversight of all workers.

Question	Contractor Response
Clearly describe the key components of the Prime Contractor's worker onboarding process. Include components such as orientation duration, how workers are qualified for their assigned tasks, and how workers will be made aware of the Prime Contractor's safety requirements etc.	<ul style="list-style-type: none"> <li>• New employee one day orientation</li> <li>• E-Verify and facial recognition photo</li> <li>• Driver's license check, Motor Vehicle Report</li> <li>• Issued a New Employee Line Clearance Orientation (NELO) training Guide 30-day completion (Green Hardhat)</li> <li>• Issued a Line Clearance Qualification Standard (LCQS) training book which includes Ground Person, Ground Trimmer, Bucket Operator, Climber Trimmer, Foreperson training. OTJ training using the OJT sign off proficiencies and final proficiencies for field, on-the-job Training</li> <li>• Electric Hazard awareness video</li> <li>• Wildland fire prevention and suppression training</li> <li>• Temporary Traffic Control training</li> <li>• HIPP and IIPP</li> <li>• Defensive Driving</li> </ul>
Clearly describe how field oversight will be provided that validates effective training and confirmation of acceptable work practices.	<ul style="list-style-type: none"> <li>• Job Behavior Observations (JBOs) completion and trending</li> <li>• Proficiency tracking and field follow up LCQS</li> <li>• GF Weekly Monitoring tracking sheet for LCQS training</li> </ul>

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	<ul style="list-style-type: none"> <li>• <i>Region Safety Trainers and RSS follow up to ensure employees are proficient with completed training materials</i></li> <li>• <i>Job Behavior observations</i></li> <li>• <i>Job briefing red pen program</i></li> <li>• </li> </ul>
<p><i>Clearly describe how all workers will be made aware of SCE requirements, including orientation to the HASP, CHOC, Handbook for Contractors and SCE specified programs and procedures.</i></p>	<ul style="list-style-type: none"> <li>• <i>All crews will have a safety stand down with Sign off for HASP, CHOC. And SCE COAs</i></li> <li>• <i>All HASP and CHOC, COAs documents shall be copied and placed on every crew vehicle</i></li> <li>• <i>HASP and CHOC, COAs documents will be verified through manual update sign off sheets that all crews are equipped. Additional verification follow-up via crew audit process</i></li> <li>• <i>Through safety stand down and training. UTS will have stand downs to distribute and review SCE environmental and safety SCE memos with sign off sheets returned per GFs</i></li> </ul>
<p><i>Clearly describe how proof of orientation will be maintained by Prime Contractor and how it can be made available to SCE upon request.</i></p>	<ul style="list-style-type: none"> <li>• <i>New employee orientation sign offs</i></li> <li>• <i>NELO book completion tracking</i></li> <li>• <i>All the above is available from UTS safety dept</i></li> </ul>
<p><i>Clearly describe how copies of the HASP, CHOC and other reference documentation will be kept at the work location of each crew.</i></p>	<ul style="list-style-type: none"> <li>• <i>All crews will have a safety stand down with Sign off for HASP, CHOC. and SCE COAs</i></li> <li>• <i>All HASP and CHOC, COAs documents will be kept in a file box marked SCE Documents</i></li> <li>• <i>HASP and CHOC, COAs documents will be verified via crew audits and field visits that all documentation and required manuals are on each crew vehicle</i></li> </ul>
 <p>HIRE PACKETT -PLAY BY PLAY.docx</p>	

# Contractor Handbook and Orientation Checklist

## SUBCONTRACTOR WORKER ORIENTATION AND MANAGEMENT

Prime Contractors shall use the spaces below to **fully** explain the key components of their subcontractor policies, demonstrating compliance to section 2.6 of the Handbook for Contractors.

Question	Contractor Response
<p>Clearly describe the key components of the Prime Contractor's evaluation and qualification process for subcontractor companies.</p>	<ul style="list-style-type: none"> <li>• Through sub-contractors training programs OUR LCQS and their in-house training.</li> <li>• Verifying Employees through credentials that they are qualified to work on Tier 1 work</li> <li>• All current Sub contractors have been performing Tier 1 work for UTS for a minimum of 10+ years</li> </ul>
<p>Clearly describe your process for initial and on-going monitoring of subcontractor TPA grades and action items.</p>	<ul style="list-style-type: none"> <li>• UTS JBOs on all sub-contractor crews</li> <li>• Safety memos from UTS and SCE forwarded to subcontractors</li> <li>• Incidents arising from sub-contractor work</li> <li>• Summaries of third party observations</li> </ul>
<p>Clearly describe the key components of the Prime Contractor's on-boarding process for subcontractor workers. Include components such as:</p> <ul style="list-style-type: none"> <li>• how subcontractor workers are qualified for their assigned tasks</li> <li>• how subcontractor workers will be made aware of the Prime Contractor's safety requirements</li> </ul>	<p><b>Key Components of Onboarding per Sub</b></p> <p><b>Communication of Safety Requirements:</b></p> <ul style="list-style-type: none"> <li>• Hazard Awareness Training</li> <li>• Lecture-style policy review with visuals and demonstration</li> <li>• Hazard Safety Training videos</li> <li>• Hands-on Hazard Awareness and application of general safety procedures</li> <li>• Skill Training</li> <li>• Technical training of safe tool handling</li> <li>• Application of safety procedures in relation to tool handling</li> <li>• Safety Policy Handbooks provided for future reference</li> </ul> <p><b>Assignment Qualification:</b></p> <ul style="list-style-type: none"> <li>• Experience background check</li> <li>• Better understanding of employee background.</li> <li>• Skill Assessment</li> <li>• Verify Background with an assessment of skills relevant to job class. Helps determine qualification for carrying out assigned tasks of job class.</li> <li>• Proficiency Outlines in Line Clearance Certification Program</li> <li>• Employee must demonstrate their understanding of topics to become certified in job class and advance in job class.</li> <li>• UTS will supply All sub-contractors with LCQS books and will supply UTS weekly training material to all sub-contractors</li> </ul>

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<p><i>Clearly describe how the Prime Contractor will ensure that all subcontractor workers will be made aware of SCE requirements, including orientation to the HASP, CHOC, Handbook for Contractors and SCE specified programs and procedures.</i></p>	<ul style="list-style-type: none"> <li>• UTS will meet with subcontractors to review the HASP and CHOC and obtain crew sign off sheets for verification that all documents have been placed on all crew vehicles operating on the SCE contract</li> <li>• UTS will verify on our Sub contractor JBOs that UTS does will the sub-contractor that the material is on each truck</li> <li>• UTS will hold a management meeting with all sub-contractors to go over THE HS Handbook and Contractor Safety Management Standard 2021/2022</li> </ul>
<p><i>Clearly describe how field oversight will be provided by the Prime Contractor to validate subcontractor compliance with rules, procedures, policies and acceptable work practices.</i></p>	<ul style="list-style-type: none"> <li>• UTS will do JBOs on sub-contractor crews to insure they are following all UTS LCQS and SCE COAs</li> <li>• Joint visits and training assistance via Safety personnel</li> <li>• Distribution of UTS safety memos and policies to subcontract management teams</li> </ul>
<p><i>Clearly describe how the Prime Contractor will manage subcontractor Incidents and how they will ensure timely reporting.</i></p>	<ul style="list-style-type: none"> <li>• Sub-contractors are required to report incidents the same as UTS crews and UTS. This requires the Sub contractors to fill out the SCE incident reports with the same transparency as UTS is required by SCE to report, with the same timeline requirements</li> </ul>
<p><i>Clearly describe how the Prime Contractor will ensure that copies of the HASP, CHOC and other reference documentation will be kept at the work location of each subcontractor crew.</i></p>	<ul style="list-style-type: none"> <li>• UTS will meet with subcontractors to discuss the HASP and CHOC and get a ALL crew sign off sheet that all materials are on each crew vehicle</li> <li>• UTS will verify during subcontractor JBOs and field visits that all required documentation is on each crew vehicle</li> </ul>



UTS Subcontractor Safety Management



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2. Shall ensure work is performed in accordance with the Checklist items and the SCE Contractor Hazard Assessment and Safety Plan. <i>(Safety Tier 1 work only)</i>	Initial:	RM
3. Shall ensure a review of the SCE Contractor Hazard Assessment and Safety Plan is completed with all workers and any new workers and subcontractors prior to beginning work on the project. <i>(Safety Tier 1 work only)</i>	Initial:	RM
4. Shall ensure that the CHOC and HASP is updated as needed (e.g., when any component changes or when additional hazard mitigations are required). At minimum it must be <b>reviewed, updated and signed annually</b> . The most current Plan must be uploaded in the Third-Party Administrator (TPA).	Initial:	RM
5. Shall ensure that expectations for Safety Tier 1 Contractors (Handbook Section 2.4) are met and maintained for the duration of the contract period. The major requirements are itemized below: <i>(Safety Tier 1 work only)</i> : <ul style="list-style-type: none"> <li>a. Onsite Supervisor</li> <li>b. Safety Professional</li> <li>c. New Worker Supervision and Training</li> <li>d. Tailboard Requirement</li> <li>e. Safety Observation Program</li> <li>f. Leader Safety Culture Training</li> <li>g. Stop Work Responsibility</li> <li>h. Fitness For Duty</li> <li>i. Contractor Safety Quality Assurance Reviews</li> <li>j. Monthly Safety Data Reporting</li> <li>k. Contractor Safety Forum Participation</li> </ul>	Initial:	RM
6. Shall ensure that expectations for Safety Tier 1 HR Contractors (Handbook Section 2.5) are met and maintained for the duration of the contract period. The major requirements are itemized below: <i>(Safety Tier 1 work only)</i> : <ul style="list-style-type: none"> <li>a. Safety Observation Frequency</li> <li>b. Safety Professional Requirement</li> <li>c. Critical Observable Actions Requirements</li> <li>d. AED Requirements</li> </ul>	Initial:	RM
7. Shall ensure all Prime Contractor and subcontractor workers working on behalf of SCE know and understand that they have not only the right but the obligation to stop and report any unsafe work or work which does not meet SCE safety expectations.	Initial:	RM
8. Shall ensure all crews maintain a signed copy of the HASP, CHOC and associated reference documents at their work location while conducting Safety Tier 1 work for SCE. <i>(Safety Tier 1 work only)</i>	Initial:	RM
<b>Printed Name:</b>	Ryan Myers	<b>Date:</b> 2/1/2023

