

# QUALIFYING CONTRACTORS EXERCISE

2014 Indiana Safety Conference

## SCENARIO

- ▶ Our facility, the Widget Factory USA is about to begin a “Planned Outage.”
- ▶ During this 10-day (20-Shift) planned outage contractors will perform eight (8) major renovations and facility upgrades. The following renovations and facility upgrades are planned:

## SCENARIO

- ▶ Facility-wide plumbing renovations with upgrades to:
  - ▶ the potable water supply lines,
  - ▶ process wastewater, and
  - ▶ municipal wastewater systems
- ▶ Exterior cleaning, preparation, and painting of the entire facility, including:
  - ▶ the main building,
  - ▶ wastewater treatment facility,
  - ▶ warehouse buildings, and
  - ▶ fences

## SCENARIO

- ▶ Line 1 Widget Manufacturing System work including:
  - ▶ Demolition,
  - ▶ removal, and
  - ▶ installation of.
- ▶ Facility-wide installation of:
  - ▶ new fixed industrial stairways,
  - ▶ fixed industrial ladders,
  - ▶ standard railings, and elevated walking and
  - ▶ working surfaces

## SCENARIO

- ▶ Facility-wide electrical upgrades to:
  - ▶ electrical raceways,
  - ▶ circuit breaker panels, and
  - ▶ tie-in of the new Line 1 Widget Manufacturing System
- ▶ Cleaning, painting, and striping of the:
  - ▶ facility production floor,
  - ▶ warehouse floors,
  - ▶ laboratory floor, and
  - ▶ wastewater plant floor

## SCENARIO

- ▶ Industrial window services to:
  - ▶ inspect all facility windows,
  - ▶ clean all acceptable windows, and
  - ▶ replace damaged or defective window systems
- ▶ New Widget Factory USA Integrated Computer System H9000 work including:
  - ▶ Installation,
  - ▶ implementation,
  - ▶ debugging, and
  - ▶ operator training in the use of the

## EIGHT (8) GROUPS

- ▶ Eight (8) Management Groups are being assigned one (1) task to perform during the planned outage
  - ▶ Form Eight (8) Management Groups
  - ▶ Mix it up – join groups with other participants that you have not worked with – meet new people!
  - ▶ We want to Learn and Have a Good Time!

## GROUP ASSIGNMENTS

- ▶ **Group 1** - Facility-wide plumbing renovations and upgrades to the potable water supply lines, process wastewater, and municipal wastewater systems
- ▶ **Group 2** - Exterior cleaning, preparation, and painting of the entire facility, including the main building, wastewater treatment facility warehouse buildings, and fences

## GROUP ASSIGNMENTS

- ▶ **Group 3** - Demolition, removal, and installation of a new Line I Widget Manufacturing System
- ▶ **Group 4** - Facility-wide installation of new fixed industrial stairways, fixed industrial ladders, standard railings, and elevated walking and working surfaces

## GROUP ASSIGNMENTS

- ▶ **Group 5** - Facility-wide electrical upgrades to electrical raceways, circuit breaker panels, and tie-in of the new Line I Widget Manufacturing System
- ▶ **Group 6** - Cleaning, painting, and striping of the facility production floor, warehouse floors, laboratory floor, and wastewater plant floor

## GROUP ASSIGNMENTS

- ▶ **Group 7** - Industrial window services to inspect all facility windows, cleaning of acceptable windows, and replacement of damaged or defective window systems
- ▶ **Group 8** - Installation, implementation, debugging, and operator training in the use of the new Widget Factory USA Integrated Computer System H9000

## CONTRACTOR PRE-QUALIFICATION FORMS

- ▶ The Widget Factory USA Procurement Department has solicited Safety Pre-Qualifications from the various types of contractors that will be hired to perform each required task. Each Group will be required to:

## GROUP ASSIGNMENTS – QUALIFYING CONTRACTORS

- ▶ Review each Contractor Safety Pre-Qualification Form
- ▶ Rate each contractor based upon the information provided in each contractor's Safety Pre-Qualification Form

## GROUP ASSIGNMENTS – QUALIFYING CONTRACTORS

- ▶ Document the ratings on the provided "Widget USA Contractor Evaluation Worksheet"
- ▶ Chose the contractor that will be awarded the contract based upon this evaluation

## GROUP ASSIGNMENTS – QUALIFYING CONTRACTORS

- ▶ Present their decision and the supporting reasons for this choice to the entire group
- ▶ The entire group may then discuss this choice, the process, bring up alternate viewpoints, etc.

## GROUP ASSIGNMENTS – QUALIFYING CONTRACTORS

- ▶ Note that there are no “right” or “wrong” answers to this exercise. It is designed to allow each group to apply the various Qualifying Contractors Strategies discussed in today’s workshop presentation.



## REMEMBER TO...

- ▶ Work together as a team
- ▶ Each Group Member should actively participate in this exercise
- ▶ Apply the ideas and strategies discussed in the “Qualifying Contractors” presentation(s)
- ▶ Have Fun!

## CONTRACTOR EVALUATION WORKSHEET

- ▶ A contractor Evaluation Worksheet is included in your Group Packages
- ▶ Use the Worksheet to compare and contrast contractors
- ▶ Jeff and Bruce will be present in the classroom to answer all questions

## PRESENTATION OF FINDINGS TO THE CLASS

- ▶ Each Group will present its decision to the entire class
- ▶ Explain your Group's Task
- ▶ Describe the three (3) Contractor's that you had to choose from to perform this task

## PRESENTATION OF FINDINGS TO THE CLASS

- ▶ Compare/Contrast:
  - ▶ Leading Indicators of Safety Performance
  - ▶ Lagging Indicators of Safety Performance
  - ▶ Past Fatalities
  - ▶ Incidence Rates
  - ▶ Safety Inspection Issues
  - ▶ Safety Professional Issues
  - ▶ Safety Training Issues
  - ▶ Safety Program Issues
  - ▶ Differences in Contractor Size
  - ▶ Differences in Contractor Safety Programs
  - ▶ Differences in Contractor Safety Professional(s)

## PRESENTATION OF FINDINGS TO THE CLASS

- ▶ Tell the Class which contractor you awarded the project and explain why this contractor was chosen over the other contractors. Be Specific
- ▶ How will your Group manage the Contractor while the contractor is on-site performing this project?
- ▶ What assistance or guidance will you provide the contractor awarded the contract prior to the start of work?

## PRESENTATION OF FINDINGS TO THE CLASS

- ▶ What improvement could the contractor not awarded the work make to place themselves in a better position to compete for this project during the next planned outage?
- ▶ Explain to the Class your thoughts on this Exercise and how this exercise can help you during the Qualifying Contractors Process back at your “Real World Jobs”
- ▶ Additional Comments/Observations