**Site Visit and Works Compliance**

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| **Objectives:**  At the end of the module, participants:   * Will understand the need for site visits * Will know how to establish the link between work authorization and an on-site audit * Will include the concept of “Quality of service rendered” * Will know how to lead a site visit. |

**This sequence is to be built locally. To this end, 2 options are available to you:**

* **either a local (or division) training exists and meets these objectives. In this case, it can be used instead of this module.**
* **if this is not the case, you must build your own training session by following the suggestions below.**

**This document contains content suggestions and educational activities to achieve the goals of this module.**

**Resources are available in the PowerPoint related to this module to help you build the module.**

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| **Key elements** | **Support/activities** |
| Most activities on-site are completed by contractors and are authorized via documents such as the Work Permit, Work Authorization, etc. These work authorizations relate to the HSE risk analysis when work is carried out rather than on verification of the work itself (its quality, compliance, code of practice). |  |
| Total is the owner of the plants and thus is:   * Guarantor for the work completed and the correct operation of plants * The customer during operations. |  |
| 2 additional measures are to be carried out by Total staff (all personnel): visits while works are ongoing and project completion. |  |
| The purpose of the checks during site **follow-up** is to ensure that:   * The safety precautions defined in the work authorization are maintained. * The work is technically well done, and that the quality is there. * The difficulties facing the contractor are taken into account quickly. |  |
| The purpose of **completion** checks is to ensure that:   * The work is carried out as technically planned, and corresponds to what was set out in the contract/preparation document. The contractor can then be paid. * The final quality is there. * The work place is clean, clear, etc. * The plant can be put back into service without risk. |  |
| The consequences of poor work can be financial (as work must be re-done) and there are also consequences to safety (since the quality of work is poor, this can entail additional risks). |  |
| The site/subsidiary audit technical standard is as follows and is detailed in procedure XXXX. | Site/subsidiary supports/frames. |
| Carry out an audit on-site. | Go on-site with the support. |

**Estimated duration:**

0.5 days to 1 day.

**Teaching method recommendations:**

This module is composed of: 2 hours in the classroom and the rest of the day is dedicated to the on-site exercise and a debrief.

1. **Pre-requisite modules for the sequence**

* TCT 3.1

1. **Preparing the sequence**

Before beginning this module, we recommend you ensure:

* You have a copy of the “site visit” procedure and associated supports for each participant.
* The procedures for conducting the on-site exercise are clear: people are informed of the procedure.

This module presents the contractual aspect from the "a contractor must provide the work set out in the contract" point of view. Do not involve the legal aspect, which is not the purpose of this module.

1. **Suggestion for sequence roll-out**

Instructions legend for the trainer:

* Comments for the trainer
* Key content elements
* **Type of activity**
* *“Question to ask”/statement of instructions*

| **Phase/Timing** | **Trainer** | **Module content suggestion** |
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| 1. Introduction and objectives  5 minutes | **Welcome participants and present the module objectives.**  The aim is for you to understand that site visits are useful and that contractors are colleagues who have to carry out activities according to their contract. | Example of an objectives overview slide:  At the end of the sequence:   * You will understand the need for site visits * You will know how to establish the link between work authorization and an on-site audit * You will be able to include the concept of “Quality of service rendered” * You will know how to lead a site visit. |
| 2. Work Permit process reminders  10 minutes -> 15 minutes | The aim of this sequence is for participants to recall the key points of the Work Permit steps, including the key points while work is ongoing (check that the precautions are in place) and during completion (check that everything is in order to resume service).  To do this, **ask** the participants, *"Who can remind us of the Work Permit steps? Who carries them out? And the key points of the last two?"*  **Note** them on the board and refer participants to the key points of the project stages (check that precautions are in place) and completion (check that everything is in order to resume service). |  |
| 3. The importance of site follow-up and the completion step  1 hour 15 minutes -> 1 hour 30 minutes | The aim of this sequence is for participants to understand the importance of the follow-up step and the completion/handover of works (to resume service safely and to pay the contractor).  To do this:  - **begin** with an actual situation:  Henri wishes to entirely refurbish the bathroom in his house. He has selected the most competent tradesman, the quote is ready and he has a good idea of what he is going to have at the end. The work must begin this morning.   * *"What measures would you advise him to put in place to ensure that the company's work is safely completed, so that Henri has no surprises at the end?"*   **Ask** the participants to answer after 3 minutes.  Answer: the quote must be followed, steady progress, the results at the end should comply with the quote, etc.  Then ask the participants (still in relation to the previous situation):   * *When and how would you advise him to follow up?* * *At what point do you think Henri will consider the job to be finished?*   **Organize** a round table discussion to gather participants' answers.  As trainer, ensure that participants say that completion involves both clearing up and resumption of service at the site.  - **Summarize** the importance and purpose of follow-up and completion.  The aim of the checks during the site/subsidiary follow-up is to ensure that:   * The safety precautions proposed in the work authorization are maintained. * The work is technically well done, and that the quality is there. * The difficulties facing the contractor are taken into account quickly.   The aim of the completion/handover is to ensure that:   * The work is carried out as technically planned, and corresponds to what was set out in the contract/preparation document. The contractor can then be paid. * The final quality is there. * The work place is clean, clear, etc. * The plant can be put back into service without risk.   - **Organize** a workshop refocusing on Henri's situation.  **Ask** the participants to answer the question *“What can happen if he does not complete this kind of activity?”*  Look at possible consequences and note them on the board.  (answers: The consequences of poor work can be financial (as work must be re-done) and there are also consequences to safety (since the quality of work is poor, this can entail additional risks).  **Ask** a participant to summarize the importance of the follow-up.  - **Read** the site procedure  **Distribute** it and ask them to read one paragraph per participant.    To summarize, **ask** questions about the key points of the procedure (examples: “Who can carry out site visits and when?", etc.) | Slide with the actual situation.  Slide with 2 questions.  Slide on the aims.  Slide containing photographs of "poorly completed" worksites.  Slide with this question.  Overview slide with the following messages  1. “It is important to react quickly during the handover. Keep in mind that you will be the "users/customers" of the operation's outcome."  2. Total is the owner of the plants and thus is:   * Guarantor for the work completed and the correct operation of plants * The customer during operations. |
| 4. The site/subsidiary supports to be used  30 minutes - > 2 hours | The aim of this sequence is to use the supports in place on-site during site visits.  - **Present** the supports  **Distribute** them and let participants read them.  **Answer** any questions.  In summary: Refocus on each support, specifying its usefulness and some comments relating to best practices.  - **Train yourself** to use the supports.  **Organize** some simple situations to train the participants on using the supports (with photographs, for example). Play the part of a Total supervisor and a member of the contracted company responsible for the works, using the photographs (works badly carried out or poorly completed). | Overview slide. |
| 5. Preparation and organization of the on-site exercise  30 minutes - > 2 hours | The aim of this sequence is to prepare the on-site exercise: what they will have to do on-site, and ways of conducting the debriefing.  - **clarify** what is expected of participants and answer any potential questions.  1. Take a permit and follow up on certain sites with an operator (superintendent or supervisor) and take part in at least 1 or 2 work completions.  2. Note down any observations and present them during the debriefing.  - **Note** the time of the debriefing on the board. |  |
| 6. On-site exercise  4 hours -> 6 hours 15 minutes | Your role as trainer: to monitor the groups. |  |
| 7. Debriefing  45 minutes - > 7 hours | The aim of this sequence: to allow participants to present their findings from the on-site exercise.  The questions that each participant must answer:   * *What did you look at? What observations did you make?* * *What were the difficulties with using the supports?*   **Organize** the debriefing, ensuring that each participant provides their answers.  Thank everyone. |  |