



# OMS Practice for Working with Contractors

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## Abstract

### What is the Working with Contractors OMS Practice?

This OMS Practice is intended to ensure that there is a formal approach to managing the risks associated with working with Contractors, that these risks are identified, assessed and controlled in a methodical way so that they can be removed or reduced to an acceptable level. For the purposes of this OMS practice, Contractors are defined as:

- All individuals contracted directly or sub-contracted.
- All employees (doing work for BP) of companies contracted directly or sub-contracted.
- All situations where a contract has not been raised and where BP's procurement policy would normally expect there to be a contract in place. This applies to all levels including sub-contracted relationships.

### Who is it for?

This Practice is intended for the use of following groups:

- Those involved in the development and maintenance of contractor management processes and procedures.
- Those directly involved in the selection and management of contractors

### Minimum requirements

Delivery of the intent of the Group Practice for Working with Contractors requires that management processes for working with contractors at all BP locations include the following minimum components:

#### Element 01: Process, Roles and Accountability

1. The management process for selection, working with and retention of Contractors shall be documented, with defined accountabilities for key roles including a BP company contract owner who shall be identified for each contract. Appropriate training and competency assessment shall be provided to those with accountabilities for selection and management of Contractors.

#### Element 02: Qualification

2. Safety capability and track record shall be used to screen Contractors in pre-qualification, with minimum pre-determined levels achieved before being considered for inclusion in a tender list.
3. "Subject to existing contractual constraints, contractors shall demonstrate and document that their staff are competent to carry out their assigned work." (BP Group Standard for Integrity Management)

#### Element 03: Tendering

4. Invitation to Tender (Request for Proposal) shall clearly define HSSE requirements. Safety shall be a major differentiator in tender exercises and shall be allocated a commensurate weighting in the overall evaluation criteria, related to the level of risk.
5. The scope of work for execution under contract shall be clearly defined, with the boundaries of BP control identified, and shall include the identification of significant potential hazards, processes and local requirements.
6. Contractors shall be required to disclose all relevant sub-contractors and shall be held accountable for ensuring that their sub-contractors comply with all HSSE requirements.

#### Element 04: Selection

7. Minimum safety requirements shall be established against which Contractors are assessed during the selection process. Selection of a Contractor that does not meet minimum safety requirements shall require formal authorization by management and include a plan to remedy identified deficiencies.

#### Element 05: Contracts

8. Contracts shall clearly define HSSE requirements, including:
  - ○ The processes for verifying compliance.
  - ○ Relevant BP Policies, Standards, Practices, Local Rules, training, competence, Personal Protective Equipment, risk assessment, audit, and resources.
  - ○ Control of Work processes, site boundaries, and authorities.
  - ○ A contract schedule with consideration of the HSSE issues involved.

- ○ A provision for the company to suspend or terminate work and withhold payments if the contractor fails to observe the HSSE criteria spelled out in the contract or the tender documents.

**Element 06: Mobilization**

9. All contract personnel shall receive a site or project specific HSSE Induction that clearly attests to their understanding of BP's HSSE expectations prior to beginning any work.
10. "A system must be in place to ensure that all equipment identified as necessary for safe completion of the task (including contractor supplied equipment) is checked by a competent person prior to work commencement to ensure it is of an adequate specification for the task, within date for testing and re-certification, and free from obvious defects / excessive wear." (BP Group Standard for Control of Work)

**Element 07: Execution & Demobilization**

11. Contractor performance and compliance shall be measured and reviewed on a regular basis during contract execution. Remedial action shall be taken if performance drops below the defined requirements.
12. Management of Change shall be an integral part of the process, including changes in the Contractor or Sub-contractors with a contract amendment implemented when appropriate.
13. During demobilization, appropriate MOC's for organizational structures and HSSE focus shall remain intact until the work is completed.

**Element 08: Final Evaluation and Lessons Learned**

14. The learning from performance reviews, investigations, and verification activities shall be documented and used in improving future contractor performance and selection.

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# 1. Introduction

## 1.1 Intent and Purpose

### Description of Risk

For the past several years, the overwhelming majority of workforce injuries and fatalities in BP have been contractor and sub-contractor employees. While injury rates have declined dramatically during this period, the fatal accident rate has not improved to the same extent.

The purpose of this Practice is to establish consistent management practices for working with contractors in BP, based on good practices, with the aim of reducing the potential for contractor injuries and fatalities. Across the world, contractors comprise about 70% of BP's workforce. At some locations, contractors fill key leadership roles and supervise work at BP locations. As we have seen on several occasions, contractors have the potential to greatly impact BP's reputation and license to operate.

Safety is one of BP's core values as described in the BP Management Framework. It is BP's aspiration to demonstrate world-class safety performance. Effective contractor management is critical to achieving this performance.

This Practice sets out a number of minimum expectations followed by supporting guidance that should be applied to Contractors to the extent that existing contracts allow. This Practice draws on lessons learned from accidents involving Contractors, both from internal and external sources. They are consistent with industry guidance, such as that provided by the International Association of Oil & Gas Producers.<sup>1 2</sup>

**Note:** This Practice reflects the balanced judgment of the BP Group and is based on experience and inputs from a variety of sources. However, it should be recognised that risk can never be eliminated and, as we learn, the Group may have to adjust the acceptable risk envelope and the Minimum Requirements of this Practice. This would result in an updated edition of this Practice being issued by the relevant authority.

### Intent

This BP OMS Practice describes a systematic approach for managing risks associated with work performed by contractors.

The primary aim of this Practice is to prevent safety incidents. However, the processes may be extended to include other aspects of performance and should be aligned with BP's supplier performance management processes.

## 1.2 Scope and Applicability

### Scope

This Practice applies to contracted work on any BP Premises, or where there is a work relationship as defined in BP Group HSSE reporting requirements. A BP Premises for the purposes of this document includes any site location, vehicle or vessel that is owned or operated by or for a BP Company. A BP Company is a company in the BP Group or other legal entity where BP has operational control, is responsible for HSSE and has the right to impose these requirements. In situations where BP does not have control (i.e. a joint venture where BP is not the operator) we should endeavour to influence the operator to implement processes that meet the minimum requirements in this document.

<sup>1</sup> "HSSE management – guidelines for working together in a contract environment", International Association of Oil & Gas Producers, Report No 6.64/291, September 1999

<sup>2</sup> "Guidelines for the development and Application and health, safety and environmental management systems", International Association of Oil & Gas Producers, Report No 6.36/210, September 1999

## Applicability

This OMS Practice applies to all operations and premises controlled, operated or owned by BP and also to all sites operated or controlled on BP's behalf.

In the event of a conflict between this OMS Practice and a relevant law or regulation, the relevant law or regulation will be followed. If the OMS Practice creates a higher obligation, it should be followed as long as full compliance with the law or regulation is achieved.

Subject to the OMS Practice's intent and subject to existing contractual constraints (to the extent that they cannot be renegotiated) this OMS Practice shall be applied to all contractors and associated contractors who perform work on BP premises and shall be incorporated in all tenders and contracts.

## 1.3 Auditing, Compliance and Deviation

### Auditing and Compliance

Monitoring adoption of this Practice and reporting on implementation and progress on meeting targets shall be locally owned and included as part of the annual HSSE self verification process for each Business, Functional and Regional Unit.

The Minimum Requirements of this Practice will form part of the basis for the audit protocols to be used by the Safety and Operations Audit.

BP businesses that are within the scope of this Practice shall adopt or modify their procedures and practices to conform to the Minimum Requirements described in this document.

In the event of a conflict between this Practice and a relevant law or regulation, the relevant law or regulation shall be followed. If this Practice creates a higher obligation, it should be followed as long as full compliance with the law or regulation is also achieved.

### Deviation from Minimum Requirements

Practices provide underpinning guidance that should be adopted (or an equivalent used) by business units, functional units and regions as determined by risk assessment and applicability.

Any risk assessment that results in the decision not to apply this Practice shall be formally justified, recorded and authorised by the relevant Business Unit leader or their delegated nominee. This record shall, if requested, be made available to the Safety and Operations Audit for review and/or challenge as appropriate.

## 1.4 Administration and Authorisation

### Administration and Authorisation

Administration and authorisation responsibilities for this Practice are:

Custodian: The VP Safety and Industrial Hygiene

Maintainer: The Director, Safety Standards

Adjudicator: The Document Authority - Senior Group Vice President, Safety and Operations

The Custodian is responsible for confirming the accuracy and integrity of content and proposed changes to the Practice.

The Maintainer is responsible for the upkeep and continued integrity of the Practice, including regular reviews and audits.

The Adjudicator is responsible for authorising and approving changes to the Practice.

### Interpretation

Questions of interpretation should be directed in writing to the custodian of this Practice for the purpose of clarification.

**Changes and Amendments**

Any suggested changes or amendments to this Practice should be forwarded to the document custodian along with the reasons for the change.

All suggestions will be acknowledged and, if rejected, the reasons given for their rejection.

Accepted changes will be administered through the document change control system employed by the Document Control Management System (DCMS).

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**Document Control and Review**

The Practice shall be held and controlled on the DCMS.

This Practice is subject to regular review and also to review whenever circumstances dictate. All reviews, regular and otherwise, shall be initiated by the Custodian.

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## 2. The Practice Structure

### 2.1 Minimum Requirements and Recommendations

#### Minimum Requirements and Operational Excellence

Minimum requirements describe the minimum processes and activities that shall be completed to deliver the intent of this OMS Practice. These Minimum Requirements will become the “benchmark” for acceptable operating within BP and will form the basis for Safety and Operations Audit Protocols.

Recommendations provide details of good practice – both internal and external to BP – which go beyond the Minimum Requirements of this Practice. These are intended to provide options for continuous improvement that will take businesses beyond “getting the basics right” and towards operational excellence. Adherence to recommendations will not be required to meet the intent of this Practice.

### 2.2 Language

#### ”Shall”, “Should” and “Must”

Throughout the BP Group OMS Practices, the words 'will', 'may', 'should', 'shall' and 'must', when used in the context of actions by BP or others, have specific meanings as follows:

- **'Should'** is used where a provision is preferred.
- **'Shall'** is used where a provision is mandatory.
- **'Must'** is used only where a provision is a statutory requirement.
- **'Will'** is used normally in connection with an action by BP, rather than by a contractor or supplier.
- **'May'** is used where alternatives are equally acceptable.

### 2.3 References and Responsibilities

#### References

References, where appropriate, are made to other relevant Standards, Practices, guidelines, procedures and documents that should be used in order to support the application of this Practice. Examples and case studies are provided to aid clarity and understanding

**Note:** It is important that all locally held documents relevant to the Practice process are readily identifiable and accessible by the workforce.

#### Responsibilities

Where appropriate, roles and responsibilities to deliver any process/activities required within this Practice are clearly defined. Delivery of these responsibilities will be locally assigned.

### 3. Practice Elements and Minimum Requirements

#### 3.1 Element 1: Process, Roles and Accountability

<b>Intent</b>	BP Executives, Managers and Supervisors shall actively participate in and recognize that effective contractor management is critical to our business success. Clearly identifying the roles and responsibilities for both BP employees and contractors and holding them accountable for desired behaviors and performance is the first step in improving contractor performance.
<b>Minimum Requirements</b>	<b>1. The management process for selection, working with and retention of Contractors shall be documented, with defined accountabilities for key roles including a company contract owner who shall be identified for each contract. Appropriate training and competency assessment shall be provided to those with accountabilities for the selection and management of Contractors.</b>
<b>Recommendations</b>	<ul style="list-style-type: none"><li>• The local contractor management process should clearly define how the Minimum Requirements of this Practice are met, with accountabilities for process implementation defined.</li><li>• The Contract Owner is the BP employee implementing the contract on BP's behalf and is:<ul style="list-style-type: none"><li>○ Accountable for Contractor Performance and Delivery</li><li>○ Accountable for Acceptance of Goods and Services</li></ul></li><li>• Establish scorecards for contractor <i>and also BP employees responsible for contractor performance.</i></li><li>• BP and contractor leadership should periodically review contractor safety and compliance performance and implement improvement plans where necessary.</li><li>• Involve Contract employees in implementing and improving the local Contractor Safety Process</li><li>• Conduct periodic meetings between local BP management and contractor management with specific topics on the agenda related to performance management of HSSE.</li><li>• Hold joint BP employee-contractor safety meetings.</li><li>• BP Managers and Supervisors should conduct regular field visits with their contractor counterparts for the purpose of observing/discussing/auditing on-the-job safety.</li><li>• Reinforce that all BP employees <b>and contractors</b> have the authority and the <b>duty</b> to stop or correct any unsafe activity, work or process.</li><li>• Some leading KPI's could be:<ul style="list-style-type: none"><li>○ Number of joint BP/contractor safety meetings or forums</li><li>○ Number and results of contractor audits --- number of open and closed items</li><li>○ % of contractors with visible behavioural safety programs</li><li>○ % completion of open incident investigation findings</li><li>○ Number of field visits by line management</li></ul></li></ul>

#### References

### 3.2 Element 2: Qualification

<b>Intent</b>	To screen potential contractors to determine if they have the necessary experience, capability and financial viability to undertake the work in a manner that meets BP's expectations.
<b>Minimum Requirements</b>	<ol style="list-style-type: none"><li><b>2. Safety capability and track record shall be used to screen contractors in prequalification, with minimum pre-determined levels achieved before being considered for inclusion in a tender list.</b></li><li><b>3. "Subject to existing contractual constraints, contractors shall demonstrate and document that their staff are competent to carry out their assigned work." (BP Group Standard for Integrity Management)</b></li></ol>

<b>Recommendations</b>	<ul style="list-style-type: none"><li>• Contractor capabilities should be verified, where feasible, through audit of work in progress, observation and interviews of key personnel.</li><li>• A pre-qualification or pre-assessment questionnaire should be used to assess how well a potential contractor's performance and HSSE Management System meets BP's requirements. Lagging indicators such as TRIR may be used as an initial gate, but then a careful review of the HSSE Management System should be used to differentiate contractors.</li><li>• Use a risk-based approach in contractor qualification. For instance, Contractors who conduct high-risk tasks should have more robust programs than those doing lower risk work.</li><li>• Segments, Functions and Regions may elect to put in place a Contractor Performance Evaluation Team (CPET) to provide support to Contractor HSSE performance improvement efforts.</li><li>• In some locations, there are consortiums of local companies that maintain a regional database of contractor performance. Also, in some parts of the world, there are private companies that maintain large contractor databases and will audit contractor documentation. Tools like these can be very helpful in contractor pre-qualification.</li><li>• To demonstrate that contract employees are trained and competent, some locations participate with regional consortiums to combine their training efforts. Contract employees must be certified by the consortium and then complete a specialized BP-specific module before being allowed on-site.</li><li>• Maintain an approved contractor list.</li></ul>
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<b>References</b>	Where relevant, "BP shall seek to hire contractors with IM programmes that are just as encompassing as this Standard – if not more so – and to encourage those who do not have such a programme to adopt one." (BP Group Standard for Integrity Management)
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BP should endeavour to hire contractors with CoW programs that are as protective, or more protective, than this Standard and encourage those who do not have such a program to adopt one. (BP Group Standard for Control of Work)

### 3.3 Element 3: Tendering

**Intent** To ensure that prospective contractors are fully informed of the scope of work, boundary conditions and HSSE requirements when preparing their bid for the contract.

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**Minimum Requirements**

4. **Invitation to Tender (Request for Proposal) shall clearly define HSSE requirements. Safety shall be a major differentiator in tender exercises and shall be allocated a commensurate weighting in the overall evaluation criteria, related to the level of risk.**
5. **The scope of work for execution under contract shall be clearly defined, with the boundaries of BP control identified, and shall include the identification of significant potential hazards, processes and local requirements.**
6. **Contractors shall be required to disclose all relevant sub-contractors and shall be held accountable for ensuring that their sub-contractors comply with all HSSE requirements.**

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**Recommendations**

- Contracting strategies should address such issues as BP/Contractor accountabilities, roles, safety risks, degree of influence, BP demand profiles, supply market capability (including safety track record), number of Contractors required, selection processes and safety performance management processes.
- It is critical that the Invitation to Tender document include as much detail as possible regarding the HSSE requirements of the job, any significant potential hazards and any other special requirements so that contractors can account for this in their bid document.
- Avoid directly managing or directing the work of sub-contractors; that is part of the contractor's job. The contractor should be held accountable for managing their sub-contractors to comply with all HSSE requirements.
- It is critical that contractors be required to disclose all sub-contractors that will be performing work for BP. This to help prevent undesirable contractors from gaining access to BP as a sub-contractor. You don't want to ban a contractor from working at your site, only to have them show up later as a sub-contractor!
- A decision should be made early on regarding how the contractor will be held accountable for the management of HSSE. This decision should be well thought out and should be communicated to all parties involved.
  - Method 1 – The contractor provides services meeting the HSSE requirements of BP using BP's HSSE management system.
  - Method 2 – The contractor provides services meeting the HSSE requirements of BP, but using the Contractor's HSSE management system. Such cases may require a bridging document which identifies gaps, defines how they are addressed and by whom.

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**References**

### 3.4 Element 4: Selection

**Intent** To fairly assess the HSSE Plans and determine if the Bid Evaluation Criteria have been met and to select the successful bidder.

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**Minimum Requirements** **7. Minimum safety requirements shall be established against which Contractors are assessed during the selection process. Selection of a Contractor that does not meet minimum safety requirements shall require formal authorization by the relevant BUL or FUL and include a plan to remedy identified deficiencies.**

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- Recommendations**
- Use a cross-functional/business team and a scoring checklist to evaluate the bids from each contractor. If possible, back up this process with face-to-face meetings and audits of each contractor. Remember that a beautifully written plan does not necessarily reflect what happens in the field.
  - Safety should be used as the tie-breaker in cases where two or more contractors score equally overall during the selection process. The contractor with the best overall safety performance and observed safety systems should be selected.
  - HSSE plans for hazardous activities shall include verification that contractors are appropriately trained, correct equipment is available, and safety management processes are in place, prior to execution.
  - To use a contractor that does not meet the minimum safety requirements, the remediation plan should include requirements like:
    - A corrective action plan to correct the contractor's deficiencies
    - Increased monitoring and auditing by BP
    - A rigorous work permitting system
    - Clearly defined consequences/penalties for non-compliance
    - Rewards tied to demonstrated improvements
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**References**

### 3.5 Element 5: Contracts

**Intent** To clearly and completely define and document all of BP's HSSE requirements and expectations either directly or by reference in the contract.

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**Minimum Requirements**

**8. Contracts shall clearly define HSSE requirements, including:**

- **The processes for verifying compliance.**
  - **Relevant BP Policies, Standards, Practices, Local Rules, training, competence, Personal Protective Equipment, risk assessment, audit, and resources.**
  - **A contract schedule with consideration of the HSSE issues involved.**
  - **A provision for the company to suspend or terminate work and withhold payments if the contractor fails to observe the HSSE criteria spelled out in the contract or the tender documents.**
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**Recommendations**

- The Contractor's leadership to supervisor to front line workforce ratio should be reviewed carefully to confirm suitable span of control.
  - Be sure the schedule allows adequate time for mobilisation and demobilisation as HSSE issues during these times are frequently overlooked.
  - Where special HSSE provisions are to be provided, the contract should clearly specify who is to pay for them. This is critical when working in a Joint Venture.
  - No contract should be executed until the BP contract owner has confirmed that BP safety and operations requirements have been satisfied, and that appropriate management plans and interfacing arrangements are in place.
  - Key Performance Indicators (to include both inputs and outputs) and arrangements for Contractor performance review should be established prior to execution. These KPI's should be carefully considered and should:
    - Not discourage or suppress the reporting of incidents.
    - Be proactive, e.g. audits, near-miss reporting and follow-up rather than safety statistics.
    - Be culturally sensitive to the local environment.
    - Motivate personnel to change behaviours that detract from HSSE performance.
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**References**

### 3.6 Element 6: Mobilization

**Intent** To confirm the HSSE plan requirements are being communicated to all relevant personnel including BP employees, contractors and subcontractors.

**Minimum Requirements**

9. **All contract personnel shall receive a site or project specific HSSE Induction that clearly attests to their understanding of BP's HSSE expectations prior to beginning any work.**

10. **"A system must be in place to ensure that all equipment identified as necessary for safe completion of the task (including contractor supplied equipment) is checked by a competent person prior to work commencement to ensure it is of an adequate specification for the task, within date for testing and re-certification, and free from obvious defects / excessive wear." (BP Group Standard for Control of Work)**

**Recommendations**

- A kick-off or pre-job meeting should be held immediately after the contract award and before the execution of any work and should include:
  - Review of major hazards
  - Review of the main contractor's HSSE plan including confirmation that accountabilities, roles and responsibilities are clearly defined and understood and that appropriately qualified personnel are assigned to those roles.
  - Similar review and approval, where appropriate, of subcontractor's HSE plans.
  - Confirmation of worker competence.
  - Confirm that a contractor short service employees (SSE) process is in place. (Example SSE policy ---- Crews of 2-4 persons can have no more than 1 SSE. Crews of 5 or more persons can have no more than 20% SSE. SSE's should be clearly identified and have an identified mentor.)
  - Confirmation of HSSE KPI's, targets.
  - Review of BP's HSSE policy and location HSSE rules.
  - Confirmation of the scope and schedule of HSSE activities (meetings, audits, etc.)
  - Confirmation of the interaction of the contractor's and BP's emergency response plans.
  - Confirmation of the HSSE induction and training plans.
  - Site security requirements.
  - Briefing of sub-contractors on HSSE requirements.
  - Incident reporting and investigation procedures.
- An inspection of contractor, sub-contractor and third-party supplied equipment and HSSE related procedures should be conducted and should include:
  - Inspection of all equipment
  - Communications systems
  - Environmental protection systems if applicable
  - Medical facilities and plans

**References** "Training of contract employees is primarily the responsibility of the contractor. However, owners must ensure that the appropriate training has been identified and received, and that contractor employees are competent to undertake the tasks expected of them." (BP Group Standard for Control of Work)

### 3.7 Element 7: Execution & Demobilization

**Intent** To confirm the work being performed is conducted according to the contract and the agreed upon HSSE Plan and that any additional HSSE needs that arise are properly addressed.

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**Minimum Requirements**

- 11. Contractor performance and compliance shall be measured and reviewed on a regular basis during contract execution. Remedial action shall be taken if performance drops below the defined requirements.**
- 12. Management of Change shall be an integral part of the process, including changes in the Contractor or Sub-contractors with a contract amendment implemented when appropriate.**
- 13. During demobilization, appropriate Management of Change for organizational structures and HSSE focus shall remain intact until the work is completed.**

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**Recommendations**

- Regular audits or inspections should be conducted to monitor the contractor's performance. The results should be shared with the contractor supervision.
- Develop a contractor scoreboard. If you have more than one contract company onsite, this can be a valuable improvement motivation tool.
- Conduct regular meetings involving all contractors to review performance and share information. Contractors should be actively involved in this meeting.
- A process should be implemented to confirm relevant lessons are acted upon for the current contract activities.

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**References** "Practices and procedures shall take account of the applicable hazard evaluation and risk management processes. They shall also be accessible to, and followed by, BP staff and contractors." (BP Group Standard for Integrity Management)

### 3.8 Element 8: Final Evaluation and Lessons Learned

**Intent** To conduct periodic evaluations of the contractor's performance and to provide feedback to the contractor(s) and BP. To provide a basis for improving future contractor selection and performance.

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**Minimum Requirements** **14. The learning from performance reviews, investigations, and verification activities shall be documented and used in improving future contractor performance and selection.**

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- Recommendations**
- Learnings should be systematically captured and subject to periodic formal review to identify system improvements for future activities.
  - Contractors should be included in sharing of lessons learned as appropriate, and encouraged to share lessons from comparable activities.
  - If there is a regional database for contractor performance available, you should consider using it to share your experiences with a particular contractor as well as benefit from the experiences of others.
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**References**

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## 4. Metrics

The following metrics are intended to provide an indication how well this Practice is embedded in the BP organization and also how successful it is in achieving the goal of reducing contractor related incidents.

### 4.1 Leading Indicators

SPU	Segment	Group
% BUs with a prioritised Working with Contractors implementation plan.	% BUs with a prioritised Working with Contractors implementation plan.	% segments with a prioritised Working with Contractors implementation plan.
% BUs with a documented Contractor Management Plan that meets the Minimum Requirements in this Practice.	% BUs with a documented Contractor Management Plan that meets the Minimum Requirements in this Practice.	% segments with all SPUs having a documented Contractor Management Plan that meets the Minimum Requirements in this Practice.

### 4.2 Lagging Indicators

- % reduction of Contractor related fatalities.
- % reduction of Contractor related DAFW injuries/illnesses.
- % reduction of Contractor related Recordable injuries.
- % reduction of Contractor related Severe Vehicle Accidents