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| Scope |
| This procedure applies to all Company projects, offices, facilities, asset and concession companies and Joint Venture (JV) projects where the Company Management System has been adopted by the JV Board. Where the Company is required to operate another party’s Management System then the requirements of the Joint Venture/Alliance Business Management System (BMS) Assessment (MSC-PR-0002) must be followed in relation to assessing the validity of third-party management systems. |

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| Purpose |
| The purpose of this procedure is to define the minimum expectations for HSES training and competency for employees and sub-contractors.  The requirements in this procedure are our current standards and must be adopted as part of a safe system of work. However, Projects and Contracts are also encouraged to identify new methods of working as long as these are: developed through rigorous risk assessment, demonstrably improve on current standards, deliver legal compliance and are approved in accordance with the Control of HSES Derogation procedure ([HSES-PR-0004](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/BMS%20Documents/HSES/Health%20and%20Safety/Procedures/HSES-PR-0004%20Control%20of%20HSES%20Derogation.docx)).  This document excludes specific arrangements for working on Network Rail Managed Infrastructure as these are dealt with in separate procedures ([HSF-PR-0029](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-12101)) and ([HSF-PR-0032](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-10852)). |

Procedural Requirements

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|  | **GENERAL** |
|  | All employees and sub-contractors must have the relevant skills/knowledge/experience/training appropriate to the tasks and activities undertaken by them. |
|  | The Supervisor must ensure that only employees and sub-contractors with the relevant skills/knowledge/experience/training are allocated to a task or activity. |
|  | Any employee and sub-contractors whom does not have the sufficient skills/knowledge/experience to complete a task safely must be effectively supervised. For example, recently trained operatives. |
|  | The training listed in the reference material ‘HSES Duty holders Minimum Training Requirements’ ([HSES-RM-0026a](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11796)) is considered the minimum mandatory requirements for various levels of roles within the Balfour Beatty businesses |
|  | In addition to these, each HSES procedure will detail any:   * Relevant training required for duty holders detailed with the procedure, and * Additional training required for any roles mentioned. |
|  | **HSES TRAINING REQUIREMENTS** |
|  | The Health and Safety Business Systems Manager must review on an annual basis the HSES training requirements detailed in the HSES management system and consolidate the information into a ‘HSES Duty holders Minimum Training Requirements’ reference material. |
|  | Each project must produce and maintain a training plan, as a minimum, utilising the R12 Training Matrix Detail Report, adding to this any additional requirements beyond the ones listed in the reference material, for example Driver CPC or Supervisor Development Pathways, and must include:   * Technical training and competency requirements * Task specific training * Client specific training   This document must be maintained and must be readily accessible particularly during August each year as it informs the following year’s training budget.  This document can be stored in the projects records on 360, within the Training Administration Report on R12 or within the Project Management Plan (PMP). The ‘HSES Training matrix Template’ [(HSES-TF-0026a](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11801)) may be used\* however other styles are acceptable.  \* duties/training not required on the project may be deleted from the template to assist in producing the project specific matrix. |
|  | Each SBU/Project must have a process in place for managing training/competency renewals and expiry dates. Employees and sub-contractors with expired training shall not be put to work until this has been renewed. Additional training must be identified during a training needs analysis/PDR process.  New employees or those that are new to a role/Project shall have a training needs analysis completed as part of the setting to work process and a training plan agreed. |
|  | Competency and training accreditations remain valid until the expiry date, providing it complies with procedural requirements and meets specific training standards required for the role or activity/operation as detailed in the ‘HSES Duty holders Minimum Training Requirements’ ([HSES-RM-0026a](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11796). |
|  | **APPROVED CARD SCHEMES** |
|  | CSCS cards provide proof that individuals have the required training and qualifications for the type of work they carry out. |
|  | A limited number of non CSCS card schemes are accepted by the business, and these are detailed within the ‘Approved Card Schemes’ reference material ([HSES-RM-0026b](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11797)). |
|  | To clarify the requirements regarding traditional National Plant Operators Registration Scheme (NPORS) card holders.  All existing NPORS trained employees\* must be transferred to the new NPORS (CSCS) card with an NVQ by the 1st July 2019. G&W, PTD & P&FS sites can continue to accept the traditional NPORS card until this date.  \* Exceptions may apply where an NVQ is not available and the acceptance of traditional (Non-CSCS) competency and training accreditations are subject to agreement with Regional HSES Manager. |
|  | **COMPETENCY ASSESSMENT** |
|  | To ensure that employees and sub-contractors are competent to carry out the task, the supervisor must undertake a review of their performance in the role.  Where a deficiency in competency is identified this must be addressed. This may take the form of additional training or mentoring/supervision for employees and notifying sub-contractor management of supply chain deficiencies.  Where there is no deficiency of training or mentoring, and performance concerns remain, then applicable HR capability ([HRS-PL-0002](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/BMS%20Documents/Human%20Resources/Policies/HRS-PL-0002%20Capability%20Policy.docx)) or disciplinary ([HRS-PL-0008](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/BMS%20Documents/Human%20Resources/Policies/HRS-PL-0008%20Disciplinary%20Policy.docx)) policies must be followed. |
|  | **RECORDS** |
|  | The Site Lead must ensure that training records for employees are maintained on Oracle R12. |
|  | The Site Lead must ensure that copies of sub-contractor training records are obtained, maintained, accessible and secure. |
|  | The Site Lead must ensure that competence/training cards such as CPCS are validated with the card supplier. Validation contact details for each Card Scheme are available in the ‘Approved Card Schemes’ reference material ([HSES-RM-0026b](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11797)) |
|  | Individual employee’s competence cards are maintained on Oracle R12 and can be made available on request.  Sub-contractor competence cards (or copies) must be available on request |
|  | Employees and sub-contractors with training certificates which do not have a fixed expiry date must either:   * Refresh the training after 5 years, * Be able to demonstrate current updated knowledge and skills via either Continual Professional Development (CPD), or the PDR process * Complete supplementary training suitable to the business (i.e. NEBOSH & IOSH beyond 5yrs takes SMSTS) or, * No longer undertake activities related to the training. |
|  | All data on individuals (electronic or paper based) must be kept and processed in accordance with the Data Protection Policy ([HRS-PL-0003](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/BMS%20Documents/Legal/Policies/LGL-PL-0042%20Data%20Protection%20Policy.docx)). |
|  | **TRAINING REQUESTS** |
|  | Each SBU must have processes in place to request employee training. These processes must be made clear to all employees. The process can be found [here](https://home360.balfourbeatty.com/academy/Pages/Technical-Training.aspx) |

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| Abbreviations / Definitions | |
| **Site Lead** | The person directly responsible for the Health and Safety of all employees, subcontractors and third parties, and for the care of the environment, affected by our works. |

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| INPUTS | | |
| **Reference** | **Type** | **Title** |
| [1974 c.37](http://www.legislation.gov.uk/ukpga/1974/37) | Legislation | Health and Safety at Work Act 1974 |
| [1999 No.3242](http://www.legislation.gov.uk/uksi/1999/3242/contents/made) | Legislation | Management of Health and Safety at Work Regulation |
| [HSF-PL-0001](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-171) | Policy | Health & Safety Policy statement |
| [ENV-PL-0001](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-172) | Policy | Environmental Policy statement |
| [HRS-PL-0003](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/BMS%20Documents/Legal/Policies/LGL-PL-0042%20Data%20Protection%20Policy.docx) | Policy | Data Protection Policy |
| [HSES-RM-0026a](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11796) | Reference Material | HSES Duty holders Minimum Training Requirements’ |
| [HSES-RM-0026b](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11797) | Reference Material | Approved Card Schemes |
| [HSES-RM-0026c](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11798) | Reference Material | Construction Skills Certification Scheme |
| [HSES-RM-0026d](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11799) | Reference Material | Supervisor Review |
| [HSES-RM-0026e](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11800) | Reference Material | Environment & Sustainability Training Course Detail |

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| OuTPUTS | | | |
| **Reference No.** | **Document Title** | **Responsibility** | **Retention Period** |
| [HSES-TF-0026a](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-11801) | Project HSES Training Matrix | Site Lead | Project Duration |
| [HSES-SF-0026a-](mailto:https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-13088) | HSES & Technical Training Request | Training Coordinator | Until Fulfilled |
| [HSES-SF-0026c](https://home360.balfourbeatty.com/ghoreferencecentre/Group%20BMS/_layouts/DocIdRedir.aspx?ID=2KHUWT73P6SE-1572-14450) | Training Attendance Record | Site Lead | Project Duration |