

HSE

Training

By CHOOOLS CONSULTING SERVICES

PURPOSE

The EHS Phase 0 Workbook is a guidance document to help guide the EHS Pillar Team through the EHS Phase 0 Assessment by providing a number of resources to help the EHS Pillar Team develop pillar structure, identify & manage risk, incorporate a training curriculum, and implement key performance metrics & indicators.

Agenda

- Pillar Development
- Risk Identification & Risk Management
- Training
- Pillar Performance Management
- Phase 0 Assessment

1. PILLAR DEVELOPMENT

PILLAR DEVELOPMENT STEPS

- **TEAM DEVELOPMENT**
 - RECRUITING TEAM MEMBERS
 - TEAM STRUCTURE
- **SUCCESS CRITERIA (CBN)**
 - MISSION STATEMENT
 - DEFINING OBJECTIVES
 - MEASURES OF SUCCESS
- **COMMUNICATION PROCESS**
 - EHS BOARD
 - MEETING SCORECARD
 - TEAM REPORT

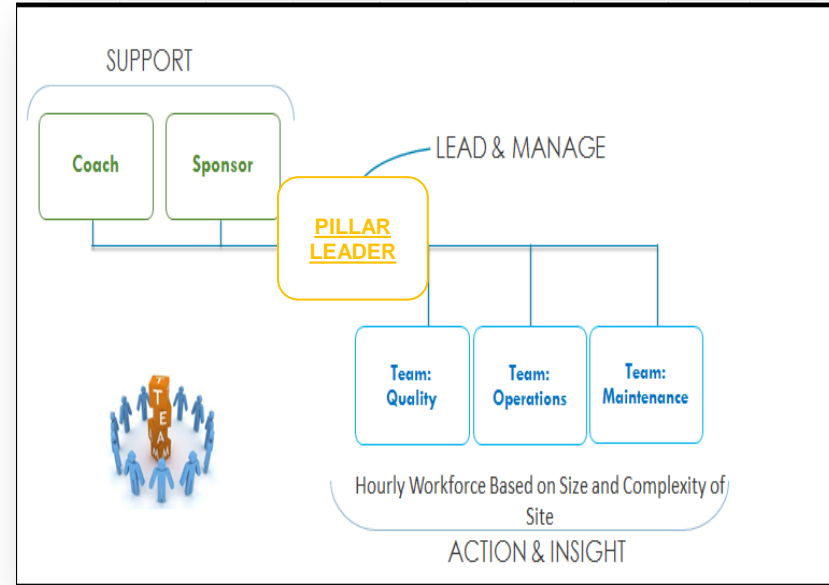
EHS Pillar Plan (Phase 0)						
Pillar Sponsor: _____			Plant/Line: _____			
Pillar Leader: _____			Date: _____			
if Complete	Responsibility:	Due Date	Detailed Activities	Status	Resources Needed	
1. Pillar Development						
<input type="checkbox"/>	EHS Pillar Team Development					
<input type="checkbox"/>	Success Criteria: Compelling Business Need (CBN)					
<input type="checkbox"/>	EHS Communication Process (i.e. EHS Board, Pillar Team Scorecard, etc.)					
<input type="checkbox"/>	EHS Communication Board					
<input type="checkbox"/>	Effective Meeting Scorecard					
<input type="checkbox"/>	EHS Pillar Team Report					
2. Risk Identification						
<input type="checkbox"/>	Loss Analysis					
<input type="checkbox"/>	Zone Layout					
<input type="checkbox"/>	EHS Zone Assessment					
<input type="checkbox"/>	Prioritize Risk (Risk Plan)					
3. Risk Management						
<input type="checkbox"/>	Conditional Inspection Process (i.e. asap, LOTD, machine safety, etc.)					
4. Training						
<input type="checkbox"/>	EHS Competency					
<input type="checkbox"/>	EHS Training Matrix					
5. Pillar Performance Management						
<input type="checkbox"/>	EHS Metrics					
<input type="checkbox"/>	EHS Scorecard					
<input type="checkbox"/>	EHS Engagement Tracker					

THE PILLAR DEVELOPMENT STAGE IS DESIGNED TO CREATE EHS PILLAR TEAM STRUCTURE, IDENTIFY KEY METRICS, & DEVELOP A ROBUST COMMUNICATION PROCESS

1. PILLAR DEVELOPMENT

PILLAR TEAM STRUCTURE

- **SUPPORT**
 - PLANT DIRECTOR & EHS MANAGER
- **LEAD & MANAGE**
 - SUPERVISOR OR HOURLY TEAM MEMBER
- **ACTION & INSIGHT**
 - A CROSS FUNCTIONAL HOURLY TEAM WITH REPRESENTATION FROM ALL DEPARTMENTS (QA, MAINT, OPS, WARE, ADMIN, etc.)



FOR THE EHS PILLAR TEAM TO BE SUCCESSFUL IT IS CRITICAL THAT ALL DEPARTMENTS ARE REPRESENTED ON THE TEAM.

1. PILLAR DEVELOPMENT

COMPELLING BUSINESS NEED (CBN)

➤ EXTERNAL/INTERNAL FACTORS

- Regulatory Requirements
- GEHSMS Requirements
- Employee Morale

➤ MISSION STATEMENT

- WHAT IS THE ULTIMATE GOAL?

➤ OBJECTIVES

- WHAT DO WE WANT TO ACCOMPLISH?

➤ MEASURES OF SUCCESS

- KEY METRICS

(i.e. DAILY INSPECTIONS, PARTICIPATION, RECORDABLES, etc.)

Compelling Business Need- CBN

EXTERNAL FACTORS	INTERNAL FACTORS
1. Regulatory Requirements 2. Workers Compensation Costs 3. Performance with Purpose Corporate Initiatives 4. Innovation/Introduction of new products/equipment 5. Changes to Corporate Safety Initiatives 6. GEHSMS 7. Hiring process. Change in available resources	1. Work Life Balance 2. Employee Morale 3. Balance of employee engagement 4. Current skills & development/training gaps/bench strength 5. Contracts/Union rules

Y

MISSION STATEMENT: **SIMPLY ZERO**

OBJECTIVES:

1. Improve ownership of employees in EHS process.
2. Develop EHS Pillar Team.
3. 100% Engagement in EHS.
4. Increase Leading Indicators.

MEASURES OF SUCCESS

1. % participation in daily inspection process
2. % participation in program elements
3. % frontline leadership in pillar PE meetings
4. % reduction of Recordable Injuries to PY
5. % reduction of Lost Time incidents to PY

BASELINE

1. 10%
2. 25%
3. 5.25
4. 10
5. 4

Yr. 1 TARGET

1. 100%
2. 75%
3. 10%
4. 25% reduction
5. 75%

Yr. 2 TARGET

1. 100%
2. 100%
3. 15%
4. 25% reduction
5. 75%

Yr. 3 TARGET

1. 100%
2. 100%
3. 15%
4. 25% reduction
5. 100%

THE EHS COMPELLING BUSINESS NEED MUST ALIGN AND ROLL-UP TO THE LOCATIONS OVERALL CBN.

1. PILLAR DEVELOPMENT

COMMUNICATION PROCESS

- **PILLAR TEAM REPORT**
 - REPORT TO TRACK METRICS AND KEY TOPICS DISCUSSED AT THE TEAM MEETING.
- **PILLAR MEETING SCORECARD**
 - SCORECARD TO ENSURE ALL MEETING OBJECTIVES ARE MET.
- **EHS COMMUNICATION BOARDS**
 - BOARD TO COMMUNICATE EHS PILLAR INFORMATION TO THE PLANT.

EHS PILLAR TEAM REPORT

DATE:
 PERIOD:

TEAM MEMBERS PRESENT:
 TEAM MEMBERS ABSENT:

NEW BUSINESS:
 OLD BUSINESS:

2017	IRR 0	LTIR 0
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PERIOD	FIRST AID & NEAR MISSES	RECORDABLES	LOST TIME	ENV NOV's
YTD				

INCIDENT DETAILS

DATE	DEPARTMENT	AREA	INCIDENT TYPE	SHIFT	PE	DETAIL	INCIDENT REPORT COMPLETED	SRC REQUIRED

EHS Pillar Team Meeting Scorecard

Pillar Owner:
 Team Members:

Score each question as 1 or 0.

1. Was Meeting Agenda Distributed prior to meeting?
2. Did agenda have objectives clearly stated and duration for each item?
3. Did meeting Start on Time?
4. Were all attendees on time?
5. Was there a time keeper?
6. Was there a note taker?
7. Did we take time for Safety?
8. Did the meeting stay on topic? Meeting was focused, productive?
9. Was the objective met?
10. Did the meeting stop on time?

Total (max possible 10)

Score	Date									
		Total								
	Assessor									

COMMUNICATION WITHIN THE EHS PILLAR TEAM & TO THE SITE IS A CRITICAL PHASE 0 REQUIREMENT

Agenda

- Pillar Development
- Risk Identification & Risk Management
- Training
- Pillar Performance Management
- Phase 0 Assessment

2. RISK IDENTIFICATION

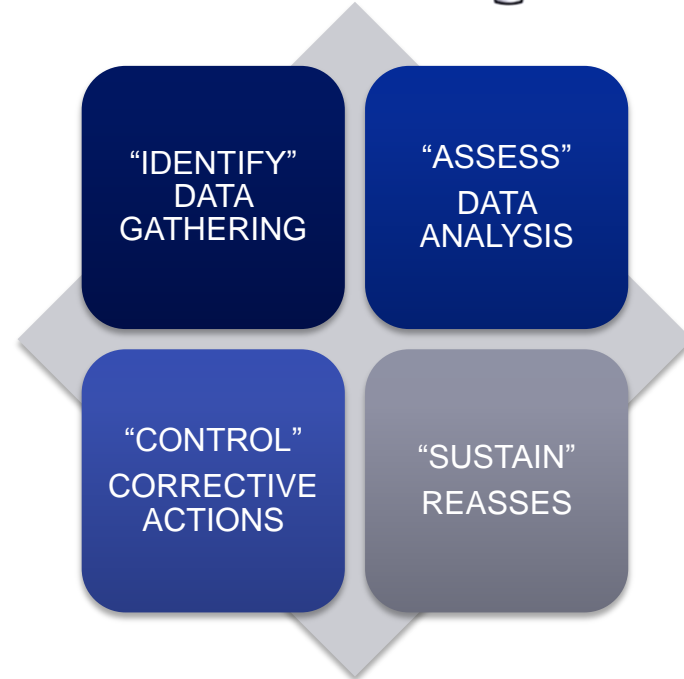
LOSS ANALYSIS

➤ LAGGING INDICATORS

- RECORDABLES
- LOST TIME
- NEAR MISS
- FIRST AID

➤ LEADING INDICATORS

- INSPECTIONS
- AUDITS
- BEHAVIOR OBSERVATIONS
- EMPLOYEE PERCEPTION SURVEYS

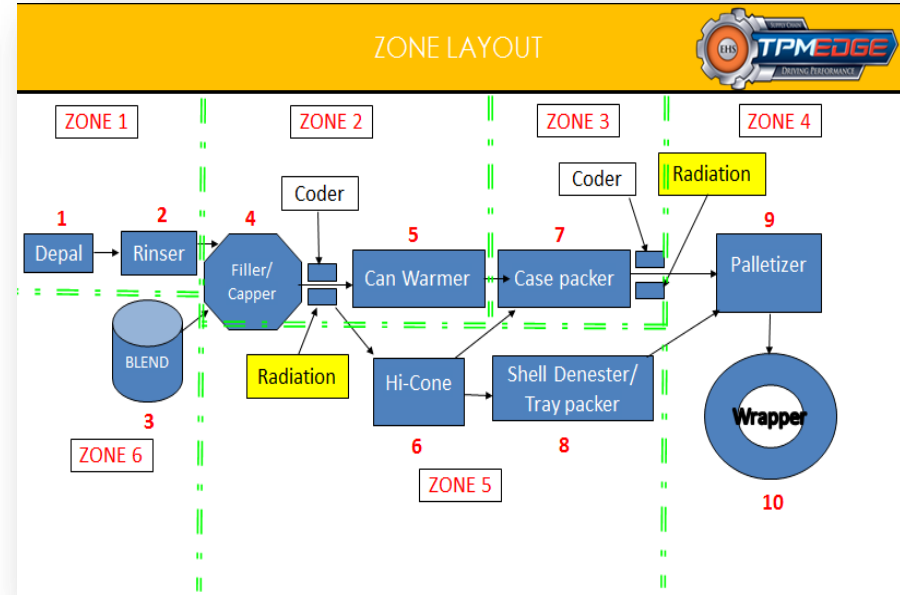


3-YEAR LOSS ANALYSIS MUST BE CONDUCTED FOR THE EHS PILLAR TEAM TO APPROPRIATELY IDENTIFY RISK & UNDERSTAND WHAT AREAS THEY SHOULD FOCUS ON FIRST. EHS LOSS ANALYSIS TOOLS ARE PROVIDED WITHIN THE EHS WORKBOOK & SITE LOSS DATA CAN BE FOUND ON THE ZERO-ZONE LIBRARY.

2. RISK IDENTIFICATION

ZONE LAYOUT

- DESIGNED TO BREAK THE LINE INTO ZONES IN ORDER FOR THE TEAM TO FOCUS ON SPECIFIC SECTIONS OF THE LINE TO CONDUCT RISK ASSESSMENTS
- THE ZONE LAYOUT PROVIDES THE TEAM WITH THE LINE PROCESS FLOW & LOCALIZED EQUIPMENT TO BE ASSESSED DURING THE ZONE ASSESSMENT PROCESS & RISK MANAGEMENT PLAN



THE ZONE LAYOUT SHOULD COMPLIMENT THE LOSS ANALYSIS PROCESS IN DETERMINING & CREATING THE SITES OVERALL RISK MANAGEMENT PLAN.

2. RISK IDENTIFICATION

ZONE ASSESSMENT

- DESIGNED TO ASSESS THE LINE EQUIPMENT USING THE TOP 5 PROGRAM ELEMENTS TOOLS.
- BASED UPON THE SITES LOSS ANALYSIS FINDINGS THE PROGRAM ELEMENTS ASSESSED CAN BE PICKED BY THE TEAM TO MEET THE ZONE ASSESSMENT REQUIREMENTS.

EHS ZONE ASSESSMENT



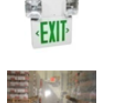
EHS ZONE ASSESSMENT						
<u>Plant</u>						
<u>Line #</u>						
Zone Description	PE Category	Activity Description	Activity Leader	Success Criteria / Target	Actual Results	Status Red/Green
Zone 1 - Depal to Rinser						
Depalletizer	MS	Create a Machine Safety Map.				
	LOTO	Create a Brady ECP				
	AM Safety	Create an AM Work Hazard Analysis				
	WWS	Create a 5's Area Safety Map				
Air Conveyor	ERGO	Create a ERGO Assessment				
	MS	Create a Machine Safety Map.				
	LOTO	Create a Brady ECP				
	AM Safety	Create an AM Work Hazard Analysis				
Rinser	WWS	Create a 5's Area Safety Map				
	ERGO	Create a ERGO Assessment				
	MS	Create a Machine Safety Map.				
	LOTO	Create a Brady ECP				
Filler/Capper	AM Safety	Create an AM Work Hazard Analysis				
	WWS	Create a 5's Area Safety Map				
	ERGO	Create a ERGO Assessment				
Zone 2 - Filler to Warmer						
Filler/Capper	MS	Create a Machine Safety Map.				

THE ZONE ASSESSMENTS SHOULD BE TRACKED VIA THE PROGRAM ELEMENT LEADER'S SITE SPECIFIC INVENTORY AND ADDED TO THE SITES OVERALL RISK MANAGEMENT PLAN TO MANAGE THE CORRECTIVE ACTIONS FROM THE ASSESSMENTS.

2. RISK IDENTIFICATION

INSPECTION PROCESS

- THE DAILY/WEEKLY/MONTHLY INSPECTION PROCESS IS DESIGNED TO IDENTIFY, ASSESS, & CONTROL EHS RISK.
- DIVISION EHS INSPECTION FORMS AVAILABLE.
- INSPECTIONS SHOULD BE CONDUCTED BY THE FRONT-LINE EMPLOYEES AND THEN TRACKED VIA THE EHS PILLAR TEAM ON THE RISK MANAGEMENT PLAN.

ASAP M&W Monthly Physical Condition Checklist		
Inspector(s)	Facility	Date
<small>Instructions: Inspector completes observations of the physical conditions listed in the left column. For each physical condition that is inadequate or requires a corrective action a note should be made in the Observation Column. Once the inspection is complete all observations requiring follow-up should be tracked on a CAP (corrective action plan). An optional CAP is included in this inspection.</small>		
	Physical Conditions	Observation
	Required Postings <ul style="list-style-type: none"><input type="checkbox"/> OSHA Poster – posted & visible<input type="checkbox"/> State Specific WC Poster – posted & visible<input type="checkbox"/> PepsiCo Occ. Health and Safety Policy – posted, visible & signed by senior management	
	Fire Suppression Systems <ul style="list-style-type: none"><input type="checkbox"/> Fire Extinguishers NOT blocked – 36 inch clearance<input type="checkbox"/> Fire Extinguishers tagged & inspected monthly<input type="checkbox"/> Fire equipment marked with signage/red paint<input type="checkbox"/> Fire Risers unobstructed<input type="checkbox"/> Plastic & Wood pallets stored properly (ref: Safety Net-Safety Pallet Storage)	
	Emergency Preparedness <ul style="list-style-type: none"><input type="checkbox"/> Emergency Maps posted<input type="checkbox"/> All shut-off valves are clearly marked on equipment<input type="checkbox"/> Windsock – present, visible & in good condition<input type="checkbox"/> Exit Doors marked & NOT blocked – 36" pathway	

INSPECTION FORMS CAN BE FOUND ON THE [ZERO-ZONE LIBRARY](#) OR CONTACT YOUR SITE PROGRAM ELEMENT LEADER.

3. RISK MANAGEMENT

RISK MANAGEMENT PLAN

- THE RISK MANAGEMENT PLAN IS DESIGNED TO PRIORITIZE ALL RISK ASSESSMENT FINDINGS INTO ONE MASTER SPREADHSEET.
- THE RISK MANAGEMENT PLAN ALLOWS THE TEAM TO UNDERSTAND THE OVERALL SITE RISK PROFILE AND THEN DECIDE WHAT RISK WILL BE ADDRESSED FIRST.
- PROVIDES THE ABILITY TO SORT BY PE, RISK, ASSESSMENT SCORE, ETC.

RISK MANAGEMENT PLAN

Site Name	Current State/Problem	PE	Date Risk Control Need Identified	Source	Type	Has a Loss incurred	Risk Matrix Scoring			Hierarchy of Control	Description of Control
							Likelihood	Severity	Overall Risk Score		
Gatorade - Tolleson	Line 5 full case conveyor needs a working platform to eliminate W@H risk.	WAH		Kaizen	Other (PepsiCo)	No	3	5	15	Elimination	Need to install a platform on the line 5 full case conveyor to eliminate the risk of

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- **Training**
- Pillar Performance Management
- Phase 0 Assessment

4. TRAINING

EHS CURRICULUM

- A SET OF TRAINING COURSES THAT PROVIDES THE EHS PILLAR LEADER & PILLAR TEAM MEMBERS WITH THE FOUNDATIONAL KNOWLEDGE TO MANAGE ALL ASPECTS OF THE EHS PILLAR & TO GUIDE THEM THROUGH THE PHASE 0 ASSESSMENT PROCESS.
- THE TRAINING CURRICULUM CONSISTS OF THE BASIC PHASE 0 BUILDING BLOCKS:
 - ESTABLISHING THE PILLAR
 - PILLAR METRICS
 - ENGAGEMENT
 - RISK ASSESSMENT
 - TOP PROGRAM ELEMENTS

EHS TRAINING CURRICULUM

Pillar	Building Block	TPM Phase	Training Course	Owner	Not Started	In Process	Completed	Due Date
EHS	Establish Pillar Team	Phase 0	CBN Overview	E. Clark-Ray				
EHS	Establish Pillar Team	Phase 0	EHS 101 Training	K. Duffer				
EHS	Establish Pillar Team	Phase 0	TPM Overview	E. Clark Ray				
EHS	Establish Pillar Team	Phase 0	Pillar Team Establishment	E. Clark-Ray				
EHS	Establish Pillar Team	Phase 0	EHS Heartfelt Leadership Training	K. Duffer				
EHS	Establish Pillar Team	Phase 0	Understanding the EHS Workbook and how to use	K. Duffer				

TRAINING CAN BE FOUND ON THE [ZERO-ZONE LIBRARY](#) ,THE [TPM PEPnet SITE](#) OR CONTACT YOUR SITE EHS MANAGER

4. TRAINING

Fundamental

- Has basic understanding of Program Element requirements;
- Familiar with the concept of the program and participates in risk assessments & development of procedures under direction of a more experienced person (i.e. PE Leader). May need to rely heavily on others to answer technical questions (i.e. GEHSMS, OSHA, EPA, LOCAL REGULATORY, etc.)
- With coaching, can help deliver pre-designed, awareness-level training & Safety Talks to other employees.

Intermediate

- Has good understanding of Program Element and can explain regulations and terminology;
- Familiar with most facility-Program Element specific requirements and can develop basic procedures, update & maintain inventories, and conduct risk assessments on their own.
- Can deliver pre-designed training on own, but may need help answering some audience questions.
- Is able to maintain/sustain compliance records (i.e. Inventories, risk assessments, training, etc.)

Advanced

(PROGRAM ELEMENT LEADER)

- Is widely recognized as a Program Element expert.
- Develops and coaches others on Program Element requirements
- Fosters collaboration among all stakeholders of the Program Element process.
- Designs and/or recommends a wide variety of Program Element improvements.
- Reviews/updates written programs, work procedures, risk assessments, inspections, incidents, etc.)
- Continually evaluates the Program Element and/or leads comprehensive audits to verify program effectiveness.

Agenda

- Pillar Development
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- Training
- **Pillar Performance Management**
- Phase 0 Assessment

5. PILLAR PERFORMANCE MANAGEMENT

GLIDEPATH

EHS GLIDEPATH

TASK

(RED/GREEN)

EHS Pillar – Phase 0 (Prerequisite)

EHS Pillar Team Development

Loss Analysis

Incident Tracker (i.e. RIR, LTIR, ISR, Near Miss, First Aid)

Engagement Tracker Created

Subcommittee Development (2 Teams)

EHS Pillar - Phase 1 (Foundational)

RIR is less than goal

LTIR is less than goal

First Aid Cases Tracked

Near Miss Cases Tracked

Top 5 Pillar Teams Established

EHS Scorecard (Created & Communicated)

EHS Pillar - Phase 2 (Improve)

ZSP Score >95%

EHS Inspection Process

EHS Training Developed for Top 5 PE Teams

LOTO ECP's Written for "A" ranked equipment

JHA's written for "A" ranked equipment

Safety Map's written for "A" ranked equipment

>75% Employee Engagement

EHS Pillar - Phase 3 (Optimize)

Self Directed Work Teams

Train The Trainer's for Top 5 PE's

100% Employee Engagement

BOS Process

Kaizen Process

SCORECARD

ENGAGEMENT TRACKER

n/a	
each period:	
EHS Pillar Meeting	EHS Talk
X	X

5. PILLAR PERFORMANCE MANAGEMENT

EHS GLIDEPATH

➤ PHASE 0- PREREQUISITE

- TEAM DEVELOPMENT
- UNDERSTANDING THE SITES RISK THROUGH THE LOSS ANALYSIS PROCESS
- UNDERSTANDING THE KEY EHS METRICS
- CREATING ENGAGEMENT ACTIVITIES
- DEVELOPING FUNCTIONAL EHS SUBCOMMITTEES.

➤ PHASE 1- FOUNDATIONAL

- THIS PHASE FOCUSES ON THE KEY EHS METRICS & COMMUNICATING THEM TO THE SITE.
- DEVELOPING THE TOP 5 SUBCOMMITTEES & TRAINING THEM ON THE FOUNDATIONAL EHS ASPECTS

PHASE 2 & 3 ARE DESIGNED TO IMPROVE EHS PROCESSES & CREATE 100% EMPLOYEE ENGAGEMENT

EHS GLIDEPATH	
TASK	(RED/GREEN)
EHS Pillar – Phase 0 (Prerequisite)	
EHS Pillar Team Development	Red
Loss Analysis	Green
Incident Tracker (i.e. RIR, LTIR, ISR, Near Miss, First Aid)	
Engagement Tracker Created	
Subcommittee Development (2 Teams)	
EHS Pillar - Phase 1 (Foundational)	
RIR is less than goal	
LTIR is less than goal	
First Aid Cases Tracked	
Near Miss Cases Tracked	
Top 5 Pillar Teams Established	
EHS Scorecard (Created & Communicated)	
EHS Pillar - Phase 2 (Improve)	
ZYP Score >95%	
EHS Inspection Process	
EHS Training Developed for Top 5 PE Teams	
LOTO ECP's Written for "A" ranked equipment	
JHA's written for "A" ranked equipment	
Safety Map's written for "A" ranked equipment	
>75% Employee Engagement	
EHS Pillar - Phase 3 (Optimize)	
Self Directed Work Teams	
Train The Trainer's for Top 5 PE's	
100% Employee Engagement	
BOS Process	
Kaizen Process	

5. PILLAR PERFORMANCE MANAGEMENT

SCORECARD

- THE EHS SCORECARD IS POPULATED WITH THE EHS PHASE 0 ASSESSMENT SCORING FOR EACH PHASE.
- THE SCORECARD SHOULD GUIDE THE EHS PILLAR TEAM ON WHAT EHS PHASE ASSESSMENT CATEGORY THEY NEED TO FOCUS ON IN ORDER TO PASS THE PHASE.
- THE EHS SCORECARD SHOULD BE POSTED ON YOUR EHS COMMUNICATION BOARD AND PHASE ASSESSMENT RESULTS SHOULD BE COMMUNICATED TO SITEWIDE

Site Name	Year	Quarter	EHS	Phase 0	Phase 1	Phase 2	Phase 3		
				0%	n/a	n/a	n/a		
EHS Pillar - Phase 3									
				n/a	n/a	n/a	n/a	n/a	
EHS Pillar - Phase 2									
				n/a	n/a	n/a	n/a	n/a	n/a
EHS Pillar - Phase 1									
				n/a	n/a	n/a	n/a	n/a	n/a
EHS Pillar - Phase 0									
				Site EHS Pillar Team	EHS Pillar Measurements	EHS Pillar TEI	EHS Risk Assessment	EHS Subcommittee Development	
				0%	0%	0%	0%	0%	

5. PILLAR PERFORMANCE MANAGEMENT

ENGAGEMENT TRACKER

- THE ENGAGEMENT TRACKER IS DESIGNED FOR THE EHS PILLAR TEAM TO TRACK EMPLOYEE ACTIVITIES ON A PERIOD BY PERIOD BASIS.
- AS THE TEAM PROGRESSES THROUGH EACH PHASE THE PERCENTAGE OF EMPLOYEES ENGAGED SHOULD GO UP (25%, 50%, 75%, 100%).
- A MINIMUM OF 1 INSPECTION & 1 OTHER EHS ACTIVITY PER WEEK IS REQUIRED TO BE CONSIDERED ENGAGED IN EHS.

EHS ENGAGEMENT TRACKER

EHS Activity Requirements for each period:

- min 1 inspection per week
- min 1 other activity per week

Period 1 2017			EHS Inspection				PE Risk Assessment	BOS (Min 1 per Period)	Lead EHS Pillar Team	EHS Kaizen	EHS Pillar Meeting	EHS Talk
Employee	Dept	Shift	Wk1	Wk2	Wk3	Wk4						
Homer Simpson	Maint	1st	X	X	X	X	X	X			X	X

Agenda

- Pillar Development
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- Training
- Pillar Performance Management
- **Phase 0 Assessment**

PHASE 0 EHS ASSESSMENT

EHS PHASE 0 ASSESSMENT

- THE EHS PHASE 0 ASSESSMENT IS A 1-PAGE DOCUMENT THAT BREAKS OUT THE SCORING BY QUESTION & CATEGORY.

EHS Phase 0 Assessment

Category	Description	Value (score 0-10)	Score
Site EHS Pillar Team	1 EHS Pillar CBN is developed and communicated	0	0%
	2 EHS Pillar leader identified and trained. A back up is identified	0	
	3 EHS Site Pillar team is established and trained	0	
	4 The EHS Pillar Sponsor is identified and trained	0	

EHS PHASE 0 ASSESSMENT GUIDE

- A GUIDE TO HELP THE TEAM UNDERSTAND THE SCORING CRITERIA, GUIDELINES, & SOURCE VERIFICATION LOCATION.

EHS Phase 0 Assessment Guide

Category	Description	Pts	Score	Scoring Notes	Scoring Criteria	Scoring Guidelines
1	EHS Pillar CBN is developed and communicated	4			Pillar team CBN developed	0 = No CBN 4 = CBN is developed
		4			Pillar CBN goals are linked to plant CBN	0 = CBN is not linked to plant CBN 4 = EHS Pillar CBN goals are linked to plant CBN (Casc Plant to pillar es evident)
		2			Pillar CBN has been communicated and posted on Pillar Board	1 pt each for the following: o CBN has been communicated to the Leadership o CBN has been communicated plant wide to poste Board.