

# Land transportation safety OE standard

Chevron Technical Center, HSE February 2023

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# 1 Introduction

# 1.1 **Purpose and objectives**

The purpose of the Land Transportation Safety (LTS) OE Standard (hereafter referred to as the LTS Standard) is to manage land transportation related hazards and to prevent workforce Serious Injuries and Fatalities (SIF).

Objectives of this LTS Standard include:

- Apply the Control of Work (COW) plan-prepare-deliver-learn framework to control land transportation work
- Utilize a risk-based approach to define controls for the hazards inherent to the transit of motor vehicles and mobile equipment, regardless of asset class or business segment
- Set Chevron requirements for LTS that must be met at a minimum, with flexibility to add safeguards as required for the task

The LTS Standard is part of Chevron's Operational Excellence Management System (OEMS); it is not intended to be an interpretation of any legal or regulatory requirements. Business Units must comply with applicable legal and regulatory requirements in addition to this Standard.

# 2 Scope

The LTS OE Standard applies to Chevron employees, their delegates, contractors and subcontractors (hereafter referred to as the workforce) working for Chevron assets classes engaged in land transportation activities for company business, such as light vehicle travel, mobile equipment movement, passenger movement, products and chemicals land logistics, in support of exploration, development, construction, installation, production, manufacturing, storage and delivery.

This includes work performed at locations and scenarios within the scope of the OE Data Reporting Standard and COEM process as implemented locally.

Inclusions	Exclusions
Company owned motor vehicles	Ad-hoc use of public or semipublic transportation for business travel (buses, airport shuttles, public taxis, ridesharing services (Uber, Lyft), etc.)
Contractor or subcontractor vehicles/mobile equipment within Chevron's OEDRS reporting boundaries and for which OE performance is included in the Company OE performance statistics	Vehicles/mobile equipment used by contractors to provide services to Chevron <i>and</i> other customers solely operated outside of Chevron's OEDRS reporting boundaries
Full-time charter transport as defined in OEDRS	Common carriers or spot charters as defined in OEDRS

Table 1: Application examples of the scope of the Land Transportation Safety Standard

Inclusions	Exclusions
Mobile cranes, forklifts, high-rail trucks or other equipment in transit to and from work locations, operating in the same capacity as a motor vehicle	Cranes and forklifts operating in a static lifting role, personnel lifts, vehicles operating on fixed rails
Mobile equipment transit such as "Yellow Iron" within a construction or operations site	Nonmotorized transport vehicles (e.g., moved by human), such as bicycles, hand trucks and hand-powered rail carts
Motor vehicles leased (long term) by the company	Electric carts (e.g., golf carts) not capable of traveling more than 14 mph (22.5 kph) and that are not used on roadways where there is exposure to mobile equipment/motor vehicles
	Railroad operations

# 2.1 **OE expectations met**

The LTS Standard and associated guidance documents meet the applicable expectations listed under the OEMS Workforce Safety and Health focus area.

Transportation – Manage risk in the use of aviation equipment, marine vessels, motor vehicles, mobile construction equipment and other modes of transportation.

# 2.2 Framework

The LTS Standard aligns with the four phases of work described in the Control of Work (COW) Process

- Plan select equipment, personnel and route (LTS specific requirements)
- Prepare assess transport hazards and authorize (identify controls and safeguards)
- Deliver execute transport (implement and assure safeguards)
- Learn learn from assurance and performance data

### Plan

During the planning phase, the Scope of Work Owner uses risk-based criteria and applies the Hierarchy of Controls to eliminate and/or mitigate exposure to transportation-related hazards and prevent significant incidents, workforce injuries and fatalities.

### Prepare

The preparation phase leverages the Hazard Analysis Standard to assess the applicable hazards and identify the corresponding safeguards, according to the level of exposure and potential consequences. The Work Authorization Standard is applied to authorize the transportation work when needed.

Refer to requirements 1 through 4 for expectations on planning and preparing phases.

### Deliver

The delivery phase requires the work controls and conditions to be in place, functioning and verified prior to commencing the work. It also requires monitoring if the transport work is conducted as planned and stopped if unsafe conditions arise.

Refer to requirement 5 for expectations on the delivery phase.

### Learn

The Learning phase focuses on capturing the essential data to analyze and share to improve Chevron's performance and reliability for future transportation tasks. Work authorizations are closed out in this phase.

Refer to requirement 6 for expectations on the learning phase.

# 3 Requirements

The following sections provide minimum requirements for LTS and guidance to clarify the intent of those requirements.

- Requirements **shall** be met.
- Guidance **may** be used as an aid to develop local requirements that meet or exceed LTS requirements. If examples are provided within guidance sections, they are not meant to be an exhaustive list of acceptable means for meeting a requirement. business units may develop or use other suitable methods not discussed in this document. Guidance is not auditable.
- If any of the LTS Standard requirements for vehicle/ mobile equipment can't be met, the organization management shall document the rationale for procuring/selecting vehicles/ mobile equipment with the next Best Available Safety Technology.
- In the event of a discrepancy between the requirements of this standard and applicable legal requirements, the more stringent requirement shall apply, where doing so is allowed by, and does not conflict with, applicable laws and regulations.

The vehicle/mobile equipment		
1. Requirement	Apply the Hierarchy of Controls to select fit-for-purpose vehicles/mobile equipment that are properly rated (e.g., size and weight) and equipped for the task, which shall at a minimum:	
	a. Not be classified as a motorcycle (regardless of the number of wheels)	
	b. Meet IOGP 365 recommended vehicle safety specifications, including Advanced Vehicle Safety Technology/Features, or the next Best Available Safety Technology.	
	c. Are 5-Star New Car Assessment Program (NCAP) rated for light-duty vehicles, or the next Best Available Safety Technology.	
	d. Include Rollover Protection Systems (ROPS) for heavy-duty vehicles, heavy equipment and off-road vehicles, or the next Best Available Safety Technology.	
	e. Include features and accessories that enable safe operation under predictable, location-specific conditions (e.g., seasonal weather, adverse terrain, etc.).	

Guidance	The intent of this requirement is to describe the minimum safety specifications of the equipment/vehicles used for the transport work, in alignment with IOGP 365 Guidance.
	Factors to consider include:
	Complexity of the scope of work, including schedule, work sequencing and resource constraints
	<ul> <li>Alternatives to business travel (e.g., virtual meetings and virtual site inspections)</li> </ul>
	Type of equipment/vehicle needed for the transport work
	• Preference for equipment that comes with built-in safety features rather than equipment that will require retrofits
	Preference for built-in safety features (e.g., hardware/ engineered controls) over human-based procedures
	Preference for hazard prevention over hazard mitigation
	Operational control/boundaries of vehicle/equipment use
	Driving conditions, environment where vehicle/equipment operates
	The size, weight and dimensions of any load to be transported
	Preference for Utility Terrain Vehicles (UTVs) over All-Terrain Vehicle (ATV) or any other unconventional vehicle for off-road needs
	<ul> <li>Snowmobiles are not considered ATVs but are fit-for-purpose, unconventional off-road vehicles to be used under specific circumstances with appropriate training and PPE</li> </ul>
	Consistent and proper use of required Personal Protective Equipment (PPE), as applicable
	When the minimum requirements are not reasonably practicable or
	assessed before deploying.
2. Requirement	a. Inspect, maintain, repair and upgrade vehicles/mobile equipment according to applicable regulations, manufacturers' recommendations and local requirements.
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	Availability of retrofits and/or upgrades for technology-based     orfoguarda (hardware or orginagring)
	• Ownership of equipment and responsibility for maintenance
	Modifications to provide additional job specific equipment (e.g.
	toolboxes, compressors, mounted vises, etc.)
	Resale value of vehicle/equipment
	Criteria for returning removed equipment to service
The driver/operator	
3. Requirement	Specific to the type of vehicle/mobile equipment operated, drivers/operators shall at a minimum:
	a. Have a valid and current license(s) and/or credential(s).
	<ul> <li>Complete required training and demonstrate/maintain competency which meets regulatory, manufacturer and local requirements.</li> </ul>
	c. Meet the applicable fitness for duty and fatigue risk management requirements.
Guidance	The intent of this requirement is to select the duly authorized and prepared personnel to conduct transport work applying the Fitness for Duty Process, Fatigue Risk Management and the LTS competency/training requirements. For Fitness for Duty requirements, refer to <u>Appendix C</u> (Fatigue Risk Management Requirements and Health Testing Requirements) as well as the Corporate Fitness for Duty Standard. For LTS training requirements, refer to <u>Appendix B</u> .
	Factors to consider include:
	• The physical, mental and emotional health of the driver/operator required to safely execute the work in the expected working conditions
	• The state of fatigue, and the influence of intoxicants (e.g., drugs, substances and alcohol) that can impair driver/operator's fitness and readiness for duty
	• Demonstration of competency, including the ability to safely operate the vehicle/mobile equipment to which a worker is assigned and under the conditions in which the worker is expected to operate (e.g., off road, night driving, and adverse weather condition such as snow, ice, high wind, etc.)
	• All drivers/operators that have successfully demonstrated the required competencies should receive credentials prior to operating the type of vehicle and/or equipment assigned (including governmental licenses and/or regulatory permits, if applicable). Certified drivers/operators should be able to access the corresponding credentials while conducting work.
	• Trainers and competency assessors should be certified according to industry best practices, and regulatory agencies, if applicable.
	• Extent of training required should correspond to level of risk/exposure. Factors to consider are the type of vehicle/equipment, materials/people they haul, site setting, weather/road driving conditions, and class of driver (e.g., casual business, etc.)
	• Organizations may also consider properly documented experience and safe performance of the driver/operator to acknowledge preparedness and practical knowledge in lieu of initial training requirements
	• Training should include defensive driving techniques, field practice, and/or assessments that are based on risk exposure (e.g., field practice component for higher exposure drivers)

The journey	
4. Requirement	a. Assess and identify the hazards associated with the routes used for transport work, in a fit-for-risk manner (*).
Guidance	(*) refer to "LTS Guidance Document: fit-for-risk application of requirements" for further information
	The intent of this requirement is to understand the condition of the routes used for the transport work and identify mitigation measures needed to reduce the likelihood of potential major consequence events due to route conditions (e.g., infrastructure, roads, off-road, etc.)
	Assessments of the road surface condition, integrity, geometry, roadsides obstacles, and conflicts between pedestrian and equipment traffic will help identify potential hazards associated with the transport work. Identification of these hazards will determine the need for risk mitigation measures, which should then be prioritized according to the hazard potential for high consequence events and exposure.
	Factors to consider for prioritizing route hazard assessments:
	Type of vehicle/equipment
	Use intensity (e.g., trips per week, payload per trip, etc.)
	Ownership of the road
	Availability of alternate routes
	<ul> <li>Access to emergency response and medical support</li> </ul>
	Potential for severe weather
	Exposure to security threats along the route
	Local road traffic fatality rates and incident statistics
	Local driving practices
	Clarity of road safety regulations and level of enforcement
	<ul> <li>Design, build, and maintain company-owned/managed roads and routes according to design criteria established by BU and applicable regulatory requirements</li> </ul>
Guidance	The intent of this requirement is to eliminate or reduce hazards associated with route conditions within company control by following regulatory requirements and applying BU specifications for land transportation infrastructure (e.g., Chevron Engineering Standards (CES) for roads dimensions and profile, signage, etc.) Factors to consider include:
	<ul> <li>Traffic, speed limits, weather conditions and distance</li> </ul>
	Road dimensions, surface and pavement condition
	Signage, illumination, and risk mitigation measures
	History of incidents and their lessons learned
	Regulatory climate
	Severe weather seasons would require implementation of Seasonal Plans annually (e.g., variable weather and road conditions monitoring, winterization, dust control, etc.).
	c. Apply a worksite traffic management program to protect pedestrians and equipment
Guidance	The intent of this requirement is to eliminate or reduce the hazards associated with land transportation on work sites, with an emphasis on working around mobile equipment (WAME) and preventing injuries, fatalities and property damage. This requirement applies where a site owner determines that there is a higher risk/exposure for pedestrians and/or equipment that could be struck by due to vehicle/ mobile

	equipment movement. The program should effectively describe how to
	management plans, safeguards and controls to be applied at worksites.
	Factors to consider include:
	Exclusions zones (marked with delineators)
	Use of alarms, including while backing
	Vehicle / mobile equipment blind spots and areas
	Spotter requirements
	Designated parking (areas for pickup trucks, yellow iron, etc.)
	<ul> <li>Designated safe pedestrian pathway/walkway (e.g., color-coded routes, clearly marked and illuminated)</li> </ul>
	<ul> <li>Designated lanes according to vehicle types</li> </ul>
	Appropriate signage and illumination/lighting
	Use of one-way roads/pathways/direction systems on site
	<ul> <li>Work conditions required by Permit To Work (PTW) (e.g., entry into hazardous classified areas)</li> </ul>
	d. Implement controls and hardware to safely load, secure and move cargo during transit
Guidance	The intent of this requirement is to eliminate or reduce hazards associated with the load mass, dimension, stability, chemical nature, restraint and other factors relative to the load that can impact safe performance. It is also intended to eliminate hazards associated with having unsecured tools, equipment and items (dunnage, luggage, etc.) on the carrying space or inside the cabin that can impede safe operation of the vehicle/mobile equipment.
	Factors to consider include:
	Dimension (oversize management)
	• Weight
	Capacity management
	Load restraint/securement
	Center of gravity
	Potential for in-cab movement of cargo
	Vehicle / mobile equipment configurations
	e. Implement journey management planning for trips involving Passenger Transportation Vehicles, the transportation of hazardous goods, the transportation of "oversized or unusually sized" loads and/or any other transport work with a higher risk as determined by the BU
Guidance	The intent of this requirement is to have a fit-for-risk comprehensive plan in place with the relevant land transportation safety measures to eliminate or reduce hazards associated with the transport work, from origin to destination.
	Journey management planning could range from a standing plan for recurring transport work to a specific plan for a one-time high-risk trip.
	Factors to consider include:
	Recognizing that the journey includes origin, journey and destination
	Fatigue management issues, especially in heavy haul
	Familiarity with route, road and site conditions
	Weather conditions
	Time of day

	Type of vehicle used
	Load/cargo/people being transported
	<ul> <li>Design factors, including center of gravity, turn radius and backing needs</li> </ul>
	<ul> <li>Remote locations (e.g., limited cell service, no others around, mapping/directions)</li> </ul>
	Emergency supplies (e.g., water, food, first aid, emergency kit)
	Any relevant results/findings from the route hazard assessment     (Requirement 4A)
	f. Develop and implement a local emergency response plan for potential incidents involving Passenger Transportation Vehicles, the transport of hazardous goods, the transportation of "oversized or unusually sized" loads and/or any other transport work with a higher risk as determined by the BU in alignment with the Emergency Management Process requirements
Guidance	The intent of this requirement is to reduce or mitigate the consequence incidents on or offsite (e.g., injuries, spills, rollovers) that occur while engaging in land transportation work. It is also intended to prevent/mitigate incidents associated with secondary events generated by post-crash (incident) recovery activities.
	Factors to consider include:
	• Communications and reporting (e.g., supervisor notification, who else to notify, emergency contact numbers, what data is needed and to whom it is provided)
	Medical response
	<ul> <li>Recovery services and support (e.g., towing/maintenance/road services vendors and response vehicles)</li> </ul>
	Security
	Weather conditions (e.g., extreme heat, cold, winds)
	• Emergency supplies (e.g., water, food, first aid, emergency kit)
	<ul> <li>Remote locations (e.g., limited cell service, no others around, mapping/directions)</li> </ul>
Executing transport	
5. Requirement	Prior to, during and after executing the transport work, the following is required at a minimum:
	a. Drivers/operators adhere to the Safe Driving Actions in <u>Appendix D</u>
Guidance	The intent of this requirement is to execute human-based safeguards such as those falling under the "Safe Driving Actions" (Refer to <u>Appendix D</u> ) and Save Your Life Actions/Start Work Checks (SYLA/SWC). Factors to consider include:
	Human and Organizational Performance Principles
	<ul> <li>Assessing effectiveness of Journey Plan and changes in road conditions</li> </ul>
	b. Hardware/engineered safeguards are verified as in place and functioning
Guidance	The intent of this requirement is to verify that land transportation hardware/engineered safeguards are functional, and that relevant key performance data is captured.

	Factors to consider include focusing assurance on the equipment safety
	specifications and realises such as:
	Advance vehicle safety technology and features
	Driver fatigue/distraction detection (e.g., inward facing cameras)
	• Overspeed detection
	Harsh braking/acceleration detection (e.g., driver improvement monitoring systems)
	Pedestrian/object detection (e.g., proximity sensors, backup sensors)
	• Visual range (e.g., forward facing or backup cameras)
	<ul> <li>Speed control/braking (e.g., autonomous braking)</li> </ul>
	• Equipment positioning and utilization (e.g., Geographic Information System – GIS)
	Tilt and acceleration monitoring
	Baffles for liquid cargo transport
	Load restraint devices (e.g., straps, chains, hooks, dunnage)
	Brakes/emergency brakes
	Wheel chocks
	• Route and site controls (e.g., traffic separation/exclusion zones, ground assistance, barricades)
	Emergency response equipment
	Personal protection equipment
	transportation of "oversized or unusually sized" loads, and/or any other transport work with a higher risk as determined by the BU.
Guidance	The intent of this requirement is to implement a performance improvement and coaching program for drivers and operators based on data sources from IVMS tools, such as driver improvement monitoring systems.
	Factors to consider include:
	Driving time exposure
	Driving miles/km exposure
	Driving terrain
	Site conditions
	Environmental conditions
	Type of vehicle/equipment driven
	Payload-based compensation agreements
	Speed at which vehicle is driven
	Driving under operational control
	Guidance to leaders on data review and driver coaching
	Parameters for events (speeding, harsh braking, etc.)
Learning	
6. Requirement	a. Conduct periodic post transport work reviews
Guidance	The intent of this requirement is to enable learning from normal work with both successful and undesired outcomes by evaluating land transportation safeguard performance. Frequency of periodic reviews should be determined by the BU based on hazards assessments and

	exposure (e.g., mileage, frequency of trips, hazardous nature of the transport work).
	Other factors to consider include:
	Human and Organizational Performance principles
	Leveraging post trip inspections
	<ul> <li>Assessing the adequacy of equipment selection</li> </ul>
	<ul> <li>Assessing the effectiveness of Journey and Emergency Response Plans</li> </ul>
	<ul> <li>Assessing changes in road/site/driving conditions</li> </ul>
	<ul> <li>Assessing the actual exposure and miles/km driven</li> </ul>
	Assessing the speed at which vehicle/equipment needed to be driven
	Leveraging IVMS data
	• Evaluating and understanding the level of change between the planned vs. the actual transport work
	<ul> <li>Identify trends and improvement opportunities in land transportation safety by analyzing safeguard implementation and effectiveness data from:</li> </ul>
	Assurance programs
	<ul> <li>SIF actual and probable incidents involving motor vehicles or mobile equipment in transit</li> </ul>
	<ul> <li>Working around mobile equipment (WAME) incidents involving motor vehicles and/or mobile equipment</li> </ul>
	<ul> <li>Incidents associated with the failure to safely manage cargo</li> </ul>
	<ul> <li>Any other mobile equipment or motor vehicle related incidents considered significant by BUs not otherwise classified as SIF</li> </ul>
Guidance	The intent of this requirement is to assess the effectiveness and efficiency of land transportation safeguards and controls by correlating safeguard verification and validation data with incident investigation data (e.g., assessments of safeguards and protective systems). This should result in identifying learning and improvement opportunities. BUs should:
	<ul> <li>Identify the data generated by the different assurance activities and devices</li> </ul>
	<ul> <li>Identify data from incident investigations for SIF probable and actual, cargo securement incidents, working around mobile equipment (WAME) incidents, and major/catastrophic MVCs</li> </ul>
	• Compare the data from safeguard assurance activities (e.g., V&V) with the data from incident investigations relative to protective systems and safeguard assessment
	Share the results of the analysis and lessons learned.
	Consider the use of safeguard and/or leading metrics where relevant in addition to traditional lagging metrics required by OEDRS

# 3.1 Linkages to other documents

### Internal documents

The LTS Standard references the following internal processes and documents:

- OE Risk Management Process
- OE RiskMan Procedure

- OE Audit and Assurance Standard
- Chevron Engineering Standards (CES)
- Contractor OE Management (COEM) Process
- Contractor HSE Exhibit (has MVC section for contractors)
- Fitness For Duty (FFD) Process
- OE Data and Reporting Standard (OEDRS)
- Incident Investigation & Reporting Process (II&R)
- Emergency Response Planning Procedure
- Control of Work (COW) Process
- Hazard Analysis Standard
- Work Authorization Standard

### **External documents**

- IOGP Report No. 365 and supporting guidance notes under it
- IOGP Report No. 626 (Fatigue Management)
- IOGP Report 459-1 (Life-Saving Rules Start Work Checks)
- US Department of Transportation (DOT)
- Global New Car Assessment Program (NCAP)

# 4 Roles and responsibilities

Role	Responsibilities
Enterprise Focus Area Sponsor	<ul> <li>Approve contents and changes in the Land Transportation Safety standard to promote effective implementation of systems, processes, programs and practices to manage high-risk activities associated with land transportation</li> <li>Serve as a liaison to Functional Leadership Team (FLT) and BU OE Leadership Teams on Land Transportation Safety</li> </ul>
Enterprise LTS Advisor	<ul> <li>Manage the LTS Community of Practice (CoP) and ensure its fulfillment of its role as per the charter</li> <li>Lead input to Corporate Management System Cycle (MSC), as required</li> <li>Facilitate changes in the standard design to enhance effectiveness, including obtaining necessary governance approvals</li> <li>Identify emerging issues related to the process</li> <li>Evaluate appartunities for integrating land transportation sofety.</li> </ul>
	• Evaluates opportunities for integrating land transportation safety technology within the enterprise
	Compile and share lessons learned and best practices from lookbacks     and process reviews
	Benchmark against competitors and top performers in other industries
	<ul> <li>Provide LTS subject matter expertise to BU LTS advisors</li> </ul>

Role	Responsibilities		
BU Focus Area Sponsor or OE/HSE Manager	• Serve as the advocate of this standard within the BU to ensure that it is adopted and implemented, and that staff and other resources are available		
	<ul> <li>Allocate resources to operate and improve the standard including asset allocation for business plan alignment</li> </ul>		
	• Be accountable for continual improvement of this standard in the BU and for ensuring improvement opportunities are evaluated for inclusion in the business plan		
BU LTS Advisor (or equivalent)	<ul> <li>Coordinates with local teams (including Contractor's) the implementation of the LTS Standard (and LTS Guidance Documents)</li> </ul>		
	Provide LTS subject matter expertise to BU		
	<ul> <li>Evaluate effectiveness and efficiency of BU implementation of LTS Standard by coordinating or supporting measurement, verification, analysis and learning</li> </ul>		
	<ul> <li>Evaluates opportunities for integrating land transportation safety technology within the BU</li> </ul>		
	Collaborate in the BU Management System Cycle (MSC)		
	Conduct performance reporting and trend analysis		
	Participate in and provide Enterprise LTS CoP with required input		
	<ul> <li>Works with fleet management to develop and implement IVMS program</li> </ul>		
Scope of Work Owner	<ul> <li>Requires and/or originates the transport work</li> </ul>		
or equivalent	Has the start work authority to proceed with the transport work		
	Selects the appropriate equipment and route for the transport work		
	<ul> <li>Coordinates the integration of related OE process and procedures (e.g., Fitness for Duty, COW, COEM, etc.)</li> </ul>		
	<ul> <li>Is responsible for developing and communicating journey management and emergency response plans according to the LTS standard requirements</li> </ul>		
	<ul> <li>Verifies engineered safeguards are in place on site</li> </ul>		
Fleet Manager, vehicle / mobile equipment	<ul> <li>Applies safety specifications for procuring vehicle/mobile equipment per LTS standard requirements</li> </ul>		
owner or equivalent	<ul> <li>Coordinates inspections, maintenance, repairs, upgrades, removal and replacement of vehicles/mobile equipment per LTS standard requirements</li> </ul>		
	Works with BU LTS advisor to develop and implement IVMS program		
Load Management Coordinator or equivalent	<ul> <li>Is responsible for implementing the load management requirements according to the LTS standard</li> </ul>		
Site owner or	Is responsible for the worksite or facility		
equivalent	<ul> <li>Is responsible to develop and implement the site traffic management plan</li> </ul>		
	<ul> <li>Is responsible for assessing the hazards associated with routes to, from, and around the site and identifies preferred routes</li> </ul>		
	<ul> <li>Oversees the design, construction, maintenance of site owned and managed roads according to LTS standard requirements</li> </ul>		
Driver/operator	Meet performance expectations and fulfill job requirements		
	<ul> <li>Notify supervisor of any motor vehicle incidents, infractions or mechanical concerns</li> </ul>		

Role	Responsibilities		
	<ul> <li>Notify supervisor or appropriate personnel of any circumstances that could impact his/her ability to operate a motor vehicle</li> </ul>		
	Maintain credentials, competency and overall fitness for duty		
	Follow the Safe Driving Actions per Appendix D		
	<ul> <li>Verify that engineered safeguards are in place and functioning on the vehicle/equipment</li> </ul>		
Supervisor	Hold direct reports accountable for their behaviors related to land transportation safety		
	<ul> <li>Monitor validity of credentials, completion of relevant training, competency and overall fitness for duty of their drivers/operators</li> </ul>		
	<ul> <li>Follow up on any issues/concerns reported by their direct report drivers, operators in a timely manner</li> </ul>		
	<ul> <li>Provide feedback and coaching to their direct report drivers/operators as appropriate based on driver improvement monitoring data and from any other data source</li> </ul>		

# **Appendix A: Key terms and definitions**

Advanced Vehicle Safety Technology/Feature: Includes any of the latest automated safeguards or controls designed to prevent or mitigate the impact of vehicle crashes. IOGP 365, Section B outlines the latest for both light and heavy vehicles. Examples include forward collision warning, autonomous emergency braking, lane departure warning, parking assist systems, blind spot monitoring and back-up cameras.

**All-terrain vehicle (ATV):** Also known as a quad, quad bike, three-wheeler, fourwheeler, or quadricycle, is a vehicle designed to be used off-road that travels on lowpressure tires, with a seat that is straddled by the operator, and with handlebars for steering control. In contrast to a utility terrain vehicle (UTV), an ATV has significantly less built-in safety systems.

**Best Available Safety Technology:** Technology that does not meet the minimum requirements but is the next best that can be attained as supported by a cost-benefit analysis (cost, time and effort); includes type of vehicle/equipment, design, features, specifications and other characteristics that enhance safety performance of the vehicle/equipment.

**Casual Business Driver:** Any individual who drives a Light Duty Vehicle (LDV) on Chevron business, on average, less than 1,500 miles (2,500 km) a month, or less than 4 hours a day, or less than 20 hours a week or is not exposed to abnormally difficult driving conditions based on criteria established by BU and local management.

**Commentary Drive:** A training technique whereby the driver conducts a typical journey and, while driving, explains what hazards he/she sees or can anticipate in the road ahead, including unseen hazards, and what safe driving techniques they will or would utilize to eliminate or minimize the threat from such hazards. The driver is accompanied by a qualified/designated assessor who evaluates whether the driver is employing the correct defensive driving techniques and proper seeing habits to identify and avoid driving hazards. At the end of drive, the assessor provides feedback and coaching to the driver on any areas of improvement.

**Distracted Driving:** Driving a vehicle while engaging in any activity that has the potential to distract the driver from the task of driving. Including but not limited to:

- Talking or texting on mobile devices, including hands-free use
- Accessing internet with mobile devices
- Use of other electronic devices
- Adjusting mirrors
- Operating a radio
- Eating, reading or note taking
- Programming of Global Positioning System

**DOT Regulated Driver (U.S. only):** A driver of a DOT regulated vehicle as defined in this document regardless of driver's license type or hours driven.

**DOT Regulated Vehicle ("Commercial Motor Vehicle", U.S. only):** Per 49 CFR, subtitle B, §390.5 Commercial motor vehicle means any self-propelled or towed motor

vehicle used on a highway in interstate commerce to transport passengers or property when the vehicle:

- 1. Has a gross vehicle weight rating or gross combination weight rating, or gross vehicle weight or gross combination weight, of 4,536 kg (10,001 pounds) or more, whichever is greater; or
- 2. Is designed or used to transport more than 8 passengers (including the driver) for compensation; or
- 3. Is designed or used to transport more than 15 passengers, including the driver, and is not used to transport passengers for compensation: or
- Is used in transporting material found by the Secretary of Transportation to be hazardous under 49 U.S.C. 5103 and transported in a quantity requiring placarding under regulations prescribed by the Secretary under 49 CFR, subtitle B, chapter I, subchapter C.

**Gross Vehicle Weight Rating (GVWR):** Is the maximum weight of the vehicle when fully loaded with the driver, passengers, and cargo.

**Heavy Duty Vehicle:** A motor vehicle having a Gross Vehicle Weight Rating (GVWR) that is greater than 10,000 lb.

**High Exposure Driver:** Any individual meeting the definition of "High Exposure Driver – Light" or "High Exposure Driver – Heavy" as defined in this document.

**High Exposure Driver - Light:** Any individual who exclusively drives Light Duty Vehicles (LDV) for business, on average more than 1,500 miles (2,500 km) a month, or more than 4 hours a day, or more than 20 hours a week, (regardless of distance), or is exposed to abnormally difficult driving conditions, as defined by BU and local management.

**High Exposure Driver – Heavy:** Any individual who operates mobile heavy equipment that moves across land or drives a heavy-duty vehicle with a high center of gravity.

**In Vehicle Monitoring System (IVMS):** An electronic device or application used to track and transmit driver behavior, activities and key vehicle metrics; this information can be used to provide coaching to drivers and operators on various behaviors, including but not limited to speeding, harsh braking, harsh acceleration and cornering. Additionally, IVMS may be described using a variety of terms, such as telematics, onboard monitoring system, driving improvement monitoring systems (DIMS), in-vehicle data recorder, fleet management app, or driver risk management system.

**Light Duty Vehicle:** A motor vehicle having a Gross Vehicle Weight Rating (GVWR) that is less than or equal to 10,000 lb.

**Mobile Equipment:** Any motor vehicle and equipment used for industrial or construction activities such as lifting, materials loading and handling, towing, earth movement, excavating, drilling, or similar activities that require frequent mobilization. This includes equipment also known as mobile construction equipment and "Yellow Iron" such as: dozers, loaders, graders, compactors, compactor rollers, excavators, scrapers, backhoes, cable plows, wheel trenchers, cranes, draglines, forklifts, man lifts, scissors lifts, telehandlers, pipe layers, coil tubing units, augers, drill rigs, pile drivers, mixers, hauling trucks, tractors and all other similar-type equipment.

**Motor Vehicle:** A motor vehicle is any mechanically, or electrically, powered device (excluding one moved by human or animal power) upon which or by which any person or property may be transported. For reporting purposes, the load on the motor vehicle is to be considered part of the vehicle if a crash occurs involving the load. This includes motorcycles and all-terrain vehicles.

**Motor Vehicle Crash:** A work-related motor vehicle incident (e.g., collision or other event), which resulted in vehicle damage, vehicle rollover, personal injury or fatality.

**New Car Assessment Program (NCAP):** The New Car Assessment Program (NCAP) provides consumers with information about crash protection and rollover safety of new, light vehicles. It uses a simple ranking system, where one star is the lowest ranking, and five stars is the highest. As of 2022, there are nine NCAPs covering various, but not all, regions of the world.

**Original Equipment Manufacturer (OEM):** OEM refers to the company/brand of the equipment/component parts originally installed when a vehicle was first assembled. OEM equivalent parts are those considered to be equal (or better) than OEM parts.

**Passenger Transportation Vehicle:** Any motor vehicle used to transport 8 or more passengers; could be LDV (e.g., minivan) or HDV (e.g., bus, coach).

**Professional Driver:** Any individual who is hired or engaged primarily for the purpose of driving a motor vehicle and/or mobile equipment. The vehicle can be a passenger transportation vehicle, or any other type of vehicle, including mobile equipment, finished products delivery trucks and aviation refueling trucks.

**Rollover Protection Systems (ROPS):** A system that protects mobile vehicle/equipment drivers/operators from injuries related to rollover incidents. ROPS includes structural components integrated into the vehicle/equipment frame and driver/operator restraint systems.

ROPS provide and maintain a clearance zone large enough to reduce the possibility of a seat-belted operator being crushed in the event of a rollover. ROPS structural components include multipost roll bars, frames/cages, suspensions and flexible shock absorbers. ROPS may also include other features, such as Electronic Braking System (EBS), Electronic Stability Control (ESC) and Active Rollover Protection (ARP).

**Utility terrain vehicle (UTV):** is a type of off-road vehicle, like an ATV, but designed to have greater occupational functionality, e.g., increased payload capacity, more seats, and may also include elements of a cabin such as a roof or windshield. In contrast to an all-terrain vehicle (ATV), a UTV has significantly more built-in safety systems, such as seat belts, a wider wheelbase, and roll cage.

# **Appendix B: Training and Credentials**

Driver	Initial	Field practice (Y/N)	Behind the wheel (BTW) assessment (Y/N)	Refresher/ Recertification
Casual business driver	Defensive driver course (classroom or CBT)	Ν	Ν	Safe Driving Refresher CBT, or equivalent, every three years
High exposure driver – light, and Passenger Transportation Vehicle driver	Defensive driver course with on-road training (including a commentary drive exercise), or equivalent	Y	Y	Safe Driving Refresher CBT, or equivalent, and a commentary drive exercise every three years
High exposure – heavy	<ol> <li>Defensive driver course with on- road training (including a commentary drive exercise), or equivalent</li> <li>Requires specific regulatory training + applicable BU training for the type of vehicle/mobile equipment</li> </ol>	Y	Y	1. Safe Driving Refresher CBT, or equivalent, and a commentary drive exercise every three years 2. Recertification frequency is based on the specific type of vehicle/ equipment, according to BU and regulatory requirements
Professional driver	<ol> <li>Defensive driver course with on- road training (including a commentary drive exercise), or equivalent</li> <li>Requires specific regulatory training + applicable BU training for the type of vehicle/mobile equipment</li> </ol>	Y	Y	<ol> <li>Safe Driving Refresher CBT, or equivalent, and a commentary drive exercise every three years</li> <li>Recertification frequency is based on the specific type of vehicle/mobile equipment, according to BU and regulatory requirements</li> </ol>

#### **License/Credential Verification Requirements**

Driver	Pre- Hiring Driver/Operator License/Credential Check Required? *	Post-Hiring Driver/Operator License/Credential Check Required? *	Post-Hiring Driver/Operator Record Check Required? *
Professional driver (includes product truck driver, and aviation refueling driver)	Yes	Yes, annually	Yes, annually
Passenger Transportation Vehicle driver	Yes	Yes, annually	At the discretion of management in consultation with HR
High exposure driver (light and heavy)	Yes	Yes, in alignment with refresher training cycle	At the discretion of management in consultation with HR
Other driver – casual business driver	Yes	At the discretion of management in consultation with HR	At the discretion of management in consultation with HR

\* If allowed by law, if not precluded by employment contract, and if the information is to be used only by Chevron and solely for the purpose of verifying drivers' license, credentials and record check requirements as directed by legal and HR representatives. Records include driver's license, credentials, public driving records, internal driving performance records, internal security records, and internal incident investigation records related to operating motor vehicles/mobile equipment. Record checking frequencies greater than what is required above must be done in consultation with management and HR.

# Appendix C: Fatigue risk management requirements

Driver	Maximum time driving before taking a break and break duration	Maximum hours of driving in a 24-hour period	Maximum time on duty in a 24- hour period	Maximum hours of driving per week
Professional driver	Required: 4.5 hours, followed by a 30-minute break Recommended: 2 hours, followed by a 10-minute break	Required: 12 hours Recommended: 10 hours	14 hours	Required: 72 hours, followed by at least one continuous 24- hour period of no driving Recommended: 40 hours over 4 consecutive days, followed by a 24- hour period of no driving
High exposure driver (light and heavy)	Required: 4.5 hours, followed by a 30-minute break Recommended: 2 hours, followed by a 10-minute break	Required: 12 Hours Recommended: 10 hours	Required: 16 Hours Recommended: 14 hours	40 hours over 4 consecutive days, followed by a 24- hour period of no driving
Casual business drivers	Required: 4.5 hours, followed by a 30-minute break Recommended: 2 hours, followed by a 10-minute break	Required: 12 Hours Recommended: 10 hours	Required: 16 Hours Recommended: 14 hours	40 hours over 4 consecutive days, followed by a 24- hour period of no driving

Drivers must not operate vehicles unless appropriately rested and alert. Drivers:

- Have the right to refuse to drive when they feel that they are not fully rested or alert.
- Shall pull over at a safe location when they feel sleepy and rest until safe to drive.

It is recommended not to drive after a long flight (>8 Hours) or "red-eye" flight (overnight, generally between 10 p.m. and 6 a.m.)

#### Driver health testing requirements

Driver	Required frequency of health assessments <sup>1</sup>	Required frequency of drug, alcohol, and other substance testing <sup>1</sup>
Professional driver (includes product truck driver and aviation refueling driver)	<ol> <li>Pre-employment, return to work (per Fit for Duty process), job transfer (per Fit for Duty process), and every two years</li> <li>As required by law or at management discretion in consultation with HR</li> </ol>	<ol> <li>Pre-employment</li> <li>Random</li> <li>As required by law or at management discretion in consultation with HR</li> </ol>
Passenger Transportation Vehicle driver and	As required by law or at management discretion in consultation with HR	<ol> <li>Pre-employment</li> <li>Random</li> <li>As required by law or at management discretion in consultation with HR</li> </ol>
High exposure driver (light and heavy)	As required by law or at management discretion in consultation with HR	<ol> <li>Pre-employment</li> <li>Random</li> <li>As required by law or at management discretion in consultation with HR</li> </ol>
Other driver – casual business driver	As required by law or at management discretion in consultation with HR	As required by law or at management discretion in consultation with HR

- Medical professionals will carry out and review health assessments and will treat all information gathered as confidential.
- Both health assessments and alcohol and substance testing requirements must be applied in a manner consistent with local laws and regulations.
- Managers shall consult with Chevron's Human Resources and Legal departments to ensure that all requirements relating to driver health are applied in a manner consistent with local laws.

<sup>&</sup>lt;sup>1</sup> If allowed by law, not precluded by the employment contract, and if the information is to be used only by Chevron and solely for the purpose of evaluating driver's fitness to perform professional duties. Testing frequencies greater than what is required above must be done in consultation with management and HR.

# **Appendix D: Safe driving actions**

The following actions for operating and driving motor vehicles and mobile equipment are considered lifesaving actions when put into practice consistently. Operators and drivers of motor vehicles and mobile equipment are expected to:

- Operate mobile equipment/vehicles only if appropriately licensed, trained, and qualified to do so
- Operate mobile equipment/vehicle only if fully alert and fit-to-drive, observing the established driving, working and rest hours
- Never drive or operate mobile equipment under the influence of alcohol or drugs
- Conduct applicable Save Your Life Actions (SYLA)/ Start Work Checks (SWC) prior to start work
- Conduct pre-trip inspection and confirm completion of the last post-trip inspection to verify mobile equipment/vehicle is in safe operating condition and free of apparent damage
- Conduct a 360-inspection to detect hidden objects, nearby structures, and pedestrians before moving the mobile equipment/vehicle
- Wear a seat belt while in a moving mobile equipment/vehicle
- Never text, type, talk (even hands-free), or engage in virtual meetings on a mobile device while driving or operating a vehicle
- Never allow unauthorized passengers in vehicles/mobile equipment
- Adhere to applicable Journey Management Plans developed for the transport work and communicate with supervisor when the conditions assumed for the journey plan change
- Observe posted speed limits and reduce speed according to road, weather, and/or work site conditions
- Observe applicable permitting, regulatory and local requirements
- Never use earbuds and/or audio devices that hamper communication while operating or driving
- Use the required Personal Protective Equipment (PPE) and high visibility clothing
- Chock wheels or apply failsafe brake interlock before leaving equipment idling unattended
- Never pass under mobile equipment hydraulically powered attachments while idling or in operation
- Never get under a vehicle or mobile equipment unless properly secured (e.g., with multiple wheel chocks)
- Exercise your Stop Work Authority when in doubt
- Conduct post-trip inspection as scheduled or required by regulations to identify mobile equipment/vehicle service and/or maintenance needs required prior to next transport work