



contractor operational excellence management: enterprise OE process

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1 Process overview

1.1 Purpose and objectives

The purpose of the Contractor Operational Excellence Management (COEM) process is to ensure operational excellence (OE)/health, safety and environment (HSE) risks are managed effectively during contract execution.

Objectives of the COEM process include:

- Establishing a consistent workflow to systematically manage contractors conducting work activities on behalf of Chevron
- Defining a risk-based approach for managing contracted work, including the identification of hazards, potential consequences and effective safeguards
- Enabling Procurement/Supply Chain Management (P/SCM) contracting processes

1.2 Scope

The COEM process applies to work performed by Chevron, contractors and subcontractors. This includes work performed at locations within the scope of the OE Data Reporting standard as implemented locally. The target audience for the COEM process is Chevron personnel responsible for the contractor selection process and for managing third-party contractors or fabrication service providers.

Subcontractors are considered part of the contractor workforce. Therefore, the COEM process applies to subcontractors, including lower-tier subcontractors performing work for Chevron. It is understood through contractual language that it is the responsibility of primary contractors to ensure their subcontractors meet Chevron's OE expectations, including the COEM process requirements.

The COEM process does not directly address facility design/engineering contractors that may have a direct or indirect impact on Process Safety Management (e.g., designing instrument protective systems) that could result in process safety events. Existing Facilities Design and Solutions processes and associated subject matter experts (SMEs) must be used to assess and manage such contractors.

1.3 OE expectations met

The COEM process is intended to meet the applicable expectations listed under the OEMS Common Expectations.

1.4 Requirements

The following subsections provide minimum requirements for COEM and context to clarify the intent of those requirements. The sequence of the information in this section follows the COEM process workflow, which is in four distinct phases:



Figure 1: COEM minimum requirements

1.4.1 Consequence Assessment

The purpose of the Consequence Assessment phase is to properly identify potential consequences based on the scope of work in the context of where the work will be performed (e.g., location, regulatory environment, simultaneous operations, contract schedule, availability of resources).

Understanding scope and identifying potential consequences: To identify potential consequences, the right people need to be involved in the assessment.

Requirement 1. The COEM advisor shall ensure an assessment of the contract work scope, including the context in which the work will be performed, to determine whether a credible high-consequence OE outcome exists if safeguards are not in place and effective. This shall be done with support of the COEM business owner, other SME resources as needed (e.g., risk management, rigging and lifting) and other stakeholders associated with scope execution (e.g., operations, wells, construction).

Determining contract mode: Contract mode refers to the combination of where the work will be performed and the OE/HSE management system that will have primacy during work execution. In alignment with the International Association of Oil & Gas Producers (IOGP), contract modes are defined in Table 1.

Requirement 2. The COEM business owner, with support from the COEM advisor, shall ensure the identification of the applicable contract mode for the contracted work, communicate the contract mode to P/SCM and record it in a system of record.

Table 1: Contract modes

Mode	Description
Mode 1	Work performed primarily under Chevron's OE/HSE management system within Chevron reporting boundaries
Mode 2	Work performed primarily under the contractor's OE/HSE management system within Chevron reporting boundaries (note: a bridging document is typically required) (e.g., Wells, greenfield MCP)
Mode 3	Work performed primarily under the contractor's OE/HSE management system outside of Chevron reporting boundaries (note: a bridging document is typically not required) (e.g., fabrication shops)

1.4.2 COEM Capability Assessment

The purpose of the COEM Capability Assessment phase is to meet P/SCM's due diligence requirements and determine a contractor's OE/HSE capability.

Determining the need for a COEM Capability Assessment: Not all contractors/service providers require a COEM Capability Assessment. Contracted work that meets one or more of the criteria in Requirement 3 is in scope for COEM. Contracted work that does not meet one or more of the criteria listed in Requirement 3 is out of scope for COEM (i.e., the COEM workflow stops). Business units may choose to implement selected elements of the COEM process for contracted work activities that are determined to be out of COEM scope.

Requirement 3. The COEM advisor shall ensure the assessment of a contractor's OE/HSE capability and apply the COEM process when any of the following conditions exist:

1. Results of the Consequence Assessment (Requirement 1) indicate there is a credible high-consequence outcome if safeguards are not in place and effective (only applicable to contract modes 1 and 2).
2. Local regulatory requirements mandate an OE/HSE-related assessment.
3. Description of trigger(s) for a contractor COEM Capability Assessment as established for marine-related activities as set forth by the [Chevron Marine Corporate OE Standard](#).
4. All aviation contractor(s) are required to be audited per the [Global Aviation Safety Process \(GASP\)](#). The aviation audit conclusion statement will state that the operator is "qualified," "qualified with conditions," or "not qualified." The conclusion statement will be shared with the local COEM advisor. Under no circumstances will an aviation contractor be selected for use if determined to be not qualified. All other OE/HSE capability requirements reside with the local HSE function.

Determining rigor for COEM Capability Assessment: A fit-for-purpose assessment is needed to determine if a contractor is capable to execute a defined scope of work.

Requirement 4. The COEM advisor ensures coordination with P/SCM to determine the level of verification rigor required for the COEM Capability Assessment based on the contractor's experience with Chevron in alignment with Table 2.

Table 2: Level of COEM Capability Assessment

Experience type	Definition	COEM Capability Assessment type	COEM Capability Assessment verification
New to Chevron	Contractor has not been under an active contract for any Chevron business unit within the last two years	Full COEM Capability Assessment questionnaire	The full COEM Capability Assessment questionnaire will be verified in accordance with the business unit's consequence potential-based assessment process. The business unit's verification process must be documented.
Enterprise incumbent	Contractor has had a full COEM Capability Assessment completed and has had an active contract for a Chevron business unit within the last two years	Simplified COEM Capability Assessment questionnaire	Review the completed full questionnaire from the other business unit(s) to determine what (if any) additional information is needed. The simplified COEM Capability Assessment questionnaire will be verified in accordance with the business unit's consequence potential-based assessment process. The business unit's verification process must be documented.

Designating contractor OE/HSE capability: The OE/HSE capability designation is used to communicate required preparation and contractor readiness before the execution of work.

Requirement 5. The COEM advisor shall ensure designation and documentation of the contractor's OE/HSE capability based on the COEM Capability Assessment results in alignment with Table 3. The documented OE/HSE capability designation remains in place until performance data has been collected to establish the Work-in-Progress (WIP) rating.

Table 3: COEM capability designation

Designation	Description	Special requirements for contractor to start	Score ¹
COEM qualified	No restrictions	None	≥80
COEM qualified with conditions	Contractor has capability gaps; some gaps may need to be closed prior to starting work onsite	The COEM business owner shall: <ul style="list-style-type: none"> Identify improvement actions that must be closed prior to start of work (if any) Work with the P/SCM representative to incorporate these improvement actions into the contract and define "who provides/who pays" relating to action items Verify OE/HSE gap closure for action items designated as needing to be closed prior to the start of work 	≥50 and <80

Designation	Description	Special requirements for contractor to start	Score ¹
Not COEM qualified	Contractor has significant gaps in OE/HSE performance and there is elevated OE/HSE risk to Chevron associated with awarding work to the contractor	The COEM business owner shall: <ul style="list-style-type: none"> Obtain and document an executive exception² to use the contractor Identify improvement actions that must be closed prior to start of work Work with P/SCM representative to incorporate identified improvement actions into the contract and define “who provides/who pays” relating to action items 	<50

Notes: ¹ Score thresholds for each OE/HSE capability designation in this table are applied when a full COEM Capability Assessment questionnaire is completed. When the COEM Capability Assessment for a contractor designated as enterprise incumbent is leveraged from another business unit, the COEM Capability Assessment score from the incumbent business unit may be used in the new business unit.
² A documented executive exception shall be from no lower than one level below the highest-ranking person in the business unit.

1.4.3 Pre-work execution

The purpose of the post-contract award activities is to facilitate a successful partnership between Chevron and the contractor. Collectively, these activities are intended to:

- Understand risks and identify effective safeguards for the contracted work
- Document required OE/HSE and management system bridging agreements
- Define assurance/engagement activities agreed between Chevron and contractor
- Confirm that hazards, safeguards and metrics are understood by Chevron and contractor personnel

Assessing contract-specific risk: A risk assessment is conducted to understand the risk associated with the scope of work and considering the contractor’s capability to apply effective safeguards.

Requirement 6. The COEM advisor, in coordination with the COEM business owner, shall ensure a contract-specific risk assessment is conducted based on the scope of work, the context in which the work is to be performed and the contractor’s capability to identify and deploy effective safeguards. Results of the contract-specific risk assessment shall be used to inform the COEM plan.

Developing a Contractor OE Management Plan: The level of engagement, as well as the type/frequency of safeguard assurance activities captured in the contract-specific COEM plan, should be based on the assessed risk (e.g., a more robust plan may be appropriate when the risk level is determined to be high, while less frequent engagement/assurance may be appropriate for lower risk levels).

Requirement 7. The COEM business owner shall partner with the contractor management representative (CMR), involve relevant SMEs and the COEM advisor to develop and periodically update a contract specific COEM plan. The plan shall document the following in a system of record:

1. Improvement actions needed to address contractor OE/HSE capability and/or performance opportunities, both pre-work and on an ongoing basis.

2. Required Chevron and contractor safeguard assurance activities (e.g., Start Work Checks, Verification and Validation, Essentials Checklists). Safeguard assurance activities may also relate to other OE/HSE processes (e.g., Occupational Hygiene, Environmental, Motor Vehicle Safety). Contractor assurance activities with respect to subcontractors are in scope for the COEM plan.
3. Engagement activities and frequency/schedule appropriate for the risk, ongoing contractor performance and as required by the business unit.

Developing an OE/HSE bridging agreement: A documented OE/HSE bridging agreement is required when Chevron agrees to primarily use the contractor's OE/HSE management system for work performed within Chevron reporting boundaries (i.e., work conducted in contract mode 2). Use of a bridging agreement for work in contract mode 3 is optional based on contract-specific conditions.

Requirement 8. The COEM advisor will ensure coordination with the contractor and other necessary SMEs to develop a documented bridging agreement when Chevron agrees to primarily use the contractor's OE/HSE management system.

Requirement 9. The COEM business owner shall ensure coordination with the P/SCM representative to incorporate the bridging document into the contract or service order as a legally enforceable agreement between Chevron and the contractor prior to the start of work.

Conducting post-award meetings: Post-award meetings are intended to ensure Chevron and contractor personnel understand the contract and contractor personnel are familiar with site specific expectations.

Requirement 10. The COEM business owner with support from the COEM advisor shall ensure a post-award meeting is conducted and documented to familiarize the contractor with the location, facility and personnel, and to ensure mutual understanding of hazards, applicable OE requirements and OE performance expectations.

Managing contractor short-service employees (SSEs): Contractors are expected to use a program to manage SSEs.

Requirement 11. The COEM advisor shall ensure that contractors have a program in place to manage workers that have less than three months of full-time work experience in the industry or less than three months in the same trade/craft (i.e., SSEs). The COEM advisor shall ensure the contractor's SSE program requirements are assessed against business unit-established requirements.

Incorporating contractor performance measures: Contractor performance measures are intended to reflect the contractor's OE/HSE capability while work is in progress.

Requirement 12. The business unit shall establish measures to evaluate contractor performance. The business unit measures shall include the elements below with the details as described in Table 4:

1. Business unit actual serious injury and fatality (SIF) count
2. Assurance activities: The COEM advisor will partner within the business unit to define appropriate scope-based and risk-based assurance activities
3. Follow-up on improvement opportunities: This metric represents whether improvement action items (if any) are completed correctly in a timely manner

4. Business unit-specific items (optional): This can include one or more business unit-specified items

The COEM business owner ensures the minimum business unit measures are incorporated into the COEM plan.

Table 4: Methodology for assessing contractor OE OE/HSE performance during WIP

WIP status report					
Category	Weight range	Calculation	Score	Interval	Source
Business unit actual SIF	5–15%	Count	Pass (5–15) Fail (0)	Rolling, annual	IIR, SIF dashboard (contractor specific)
Business unit-determined assurance activities	40–75%	Percentage of target rate (varying weight)	Business unit-defined targets for each contributing assurance activity	Business unit-defined	Business unit-defined (contractor specific)
Contractor follow-up on improvement opportunities	15–25%	Count	<ul style="list-style-type: none"> Acceptable (100% completed and on time) = full points Needs improvement (any open action items <30 days past due) = half points Unacceptable (any open action items >30 days past due) = zero points 	Live	IIR, contractor engagements, qualification action improvement items, safeguard assurance (contractor specific)
Business unit-specific items	0–40%	Business unit defined	Business unit-defined	Business unit-defined	Business unit-defined (contractor specific)

Note: Business units select weighting for each category within the ranges provided. Selected weighting will be applied equally to all BU contractors and contractor status will be designated as follows: COEM qualified WIP, 80–100%; COEM qualified with conditions WIP, 60–79%; not COEM qualified WIP, <60%.

Confirming contractor readiness: The intent of the readiness check is to confirm the contractor is ready to start work and that the contractor and Chevron are partnering to identify and mitigate hazards with effective safeguards.

Requirement 13. The COEM business owner shall ensure confirmation of the contractor’s readiness prior to the commencement of site activities. At a minimum, the evaluation to confirm contractor readiness includes the following:

1. Contractor personnel are trained and qualified as defined by the contract
2. Contractor personnel have completed general and site-specific orientations
3. Contractor equipment is appropriate for the scope of work
4. Determination of if the contracted scope of work has changed and if the associated hazard assessment(s) need to be reevaluated (if hazards have changed, the type and frequency of assurance activities will be adjusted as necessary)

5. If a bridging agreement is required, all gaps are closed and the bridging agreement is understood by personnel executing the work
6. For contractors that have been designated as 'qualified with conditions' or 'not COEM qualified' with respect to the COEM Capability Assessment, improvement actions due before start of work have been completed and verified

1.4.4 Work-in-Progress (WIP)

The WIP phase supports the Monitor Contract phase in Chevron's P/SCM Post-Award Contract Management process.

Managing ongoing contractor OE/HSE performance: Ensure safeguards are effectively applied and work is completed without any serious injuries or fatalities, or any other high-consequence potential outcomes.

Requirement 14. During the phase, the COEM business owner shall ensure:

1. Completion of identified improvement opportunities by the required due date, assignment of new improvement actions (if necessary) and document in a system of record.
2. Completion of assurance activities as identified in the COEM plan and document in a system of record. Assurance activities may be adjusted based on assurance results.
3. Execution of planned engagement/partnership activities with the contractor (document in a system of record and adjust schedules as appropriate).
4. Monitoring of performance to ensure that hazards relating to the scope of work are periodically checked for potential changes. If the scope of work and/or associated hazards have changed or contractor performance lags, engage the right SMEs, reassess the safeguards and consider adjusting the type and frequency of assurance activities as necessary and the documented COEM plan is updated to reflect any changes.
5. Monitoring of contractor's actual SIFs and other high-consequence contractor incidents, business unit-identified metrics, completion of improvement, assurance and engagement actions and/or activities.
6. Updates are shared with the COEM advisor and/or P/SCM regarding changes in contractor work status or contract mode.
7. If applicable, update of bridging documents to manage change in scope of work or contract mode.

Requirement 15. The COEM business owner shall ensure a fit-for-purpose COEM Capability Assessment is performed in partnership with the COEM advisor and where applicable P/SCM if any of the following conditions are met during WIP:

1. In the event of a fatality, serious injury or illness or other high-consequence incident (e.g., process safety or environmental) involving a contractor, the OE/HSE capability relevant to the incident shall be reassessed (as applicable in alignment with Incident Investigation and Reporting (II&R) process activities/corrective actions.
2. For new scopes of work involving activities with a credible high-consequence outcome, determine whether the existing COEM Capability Assessment applies to

the new scope of work. If not, assess the contractor's OE/HSE capability to perform the new scope of work.

3. If a contractor's OE/HSE management system has undergone major changes due to contractor change in ownership, the content and applicability of the new/modified OE/HSE management system of the new entity shall be assessed.
4. If the contractor will include subcontractors to execute the work where subcontractor use was previously not applicable.
5. If there is a change in the applicable contract mode.

1.5 Linkages to other documents

1.5.1 Internal documents

The COEM process references the following internal processes and documents:

- Corporate Policy 530 (Operational Excellence)
- OE Management System (OEMS)
- OE Audit and Assurance
- HSE Functional Governance
- Leadership and OE Culture
- Management System Cycle (MSC)
- OE Data Reporting Standard (OEDRS)
- OE Risk Management
- Control of Work (CoW)
- Facility Integrity and Reliability Management (FIRM)
- Pre-Award Contracting Process
- Post Award Contracting Process

1.5.2 External documents

The COEM process uses the following external industry processes and documents:

- IOGP Report No. 423: HSE management – guidelines for working together in a contract environment, April 2017

2 Procedures

Business units are encouraged to develop internal procedure(s) to enable business unit implementation of the COEM process requirements.

3 Roles and responsibilities

Refer to Appendix A for a complete list of COEM roles and responsibilities.

4 Measurement and verification

4.1 Measurement

Business units shall establish, track and review leading and lagging metrics to determine the effectiveness in meeting the purpose and objectives of the COEM process.

4.2 Verification of process effectiveness

Business units shall establish and implement verification approaches to assure conformance with the COEM process. This may be accomplished, for example, by using the OE assurance plan, OE self-assessment tools, process metrics, peer assists, benchmarking data and stakeholder inquiries.

5 Continual improvement

Business units shall evaluate the execution effectiveness of the COEM process during the annual MSC through review of leading and lagging metrics, verification programs and assurance activities. COEM improvement opportunities shall be directed by business unit leadership based on the results of the MSC review.

As part of the annual enterprise MSC, the Enterprise Workforce Safety and Health Focus Area sponsor and advisor shall review performance of the COEM process.

Appendix A: Roles, responsibilities and competencies

Role	Overall	Consequence Assessment	COEM Capability Assessment	Pre-work	Work-in-Progress	Competencies
BU COEM advisor(s)¹	<p>An active role throughout the various phases of the COEM workflow:</p> <ul style="list-style-type: none"> Coordinating the business unit's efforts to meet the enterprise COEM process, including the provision of COEM training Tracking the business unit's overall performance with respect to meeting COEM process requirements (e.g., improvement actions are completed in a timely manner, assurance plan activities are being completed) Participating in enterprise community of practice (COP) to share and leverage best practices across the corporation Supporting the business unit's MSC activities by informing applicable focus area sponsors of contractor OE/HSE performance 	<p>Ensures:</p> <ul style="list-style-type: none"> Completion of the Consequence Assessment Support for the COEM business owner in identifying the contract mode 	<p>Ensures:</p> <ul style="list-style-type: none"> Support for the business unit in determining the need for a COEM Capability Assessment on a case-by-case basis for each new/reauthorized contract Support for determining the need for and the required level of assessment rigor for the COEM Capability Assessment Adequate consulting with P/SCM, SMEs and the COEM business owner to determine if additional due diligence activities are required Coordination and execution of the COEM Capability Assessment and documentation of the outcome/results 	<p>Ensures:</p> <ul style="list-style-type: none"> Completion of the contract-specific risks assessment to identify effective safeguards Support of the COEM business owner to define the required Chevron and contractor assurance activities as part of COEM plan development COEM plans have documented improvement actions and engagement activities Tracking and completion of improvement actions required before start of work (if any) The development of the contract specific OE/HSE bridging document (if required) 	<p>Ensures:</p> <ul style="list-style-type: none"> Monitoring and completion of assurance and engagement activities Monitoring of contractor status reports and support of the COEM business owner as appropriate to address improvement opportunities Coordination with the appropriate SMEs and resources Reassessment of contractor's OE/HSE capability if any of the triggers in the process are met Updates to bridging agreement documents to clarify any changed conditions and/or responsibilities (if required) 	<ul style="list-style-type: none"> Awareness of the OEMS Understanding of how the COEM process links with other OE and P/SCM processes General understanding of OE risk management/assessment and ability to work with other OE processes and SMEs Understand the intent and scope of the COEM process COEM Capability Assessment and contractor/office field audits or equivalent audit experience Possesses relevant field experience <p>Desired:</p> <ul style="list-style-type: none"> Strong assurance background
COEM business owner²	<p>Primary point of contact for contractors working within Chevron:</p> <ul style="list-style-type: none"> Responsible for engaging/partnering with and providing overall management of the contractor while they are working for Chevron Accountable for contractor's compliance with COEM requirements and the contract specific COEM Plan Ambassador of Chevron's OE culture 	<p>Ensures:</p> <ul style="list-style-type: none"> Identification of potential work-related consequences by providing SME resources (as needed) to the COEM advisor during the fit-for-purpose Consequence Assessment Identification of contract mode 	<p>Ensures:</p> <ul style="list-style-type: none"> Support for the completion of the COEM Capability Assessment Executive exception approval is secured for use of contractors designated not COEM qualified 	<p>Ensures:</p> <ul style="list-style-type: none"> Bridging document (if required) is finalized before start of work and coordinates with P/SCM to include the bridging document in contract documentation OE/HSE expectations are communicated and understood in post-award meeting(s) Partnership with the CMR to develop the contract specific COEM plan and communicate target OE/HSE metrics with contractor 	<p>Ensures:</p> <ul style="list-style-type: none"> The contract specific COEM plan is updated Partnership with the CMR to fully execute the contract specific COEM plan Tracking and documentation of the contractor WIP OE/HSE performance Notification to impacted parties if there are changes that may trigger an updated COEM Capability Assessment and/or contract(s) as appropriate 	<ul style="list-style-type: none"> Awareness of the applicable OE/HSE regulations, standards, operating procedures and policies Demonstrate strong communication skills Demonstrate partnership, collaboration and teamwork Relevant field experience or capability to ensure identification of hazards and/or gaps in contractor's OE/HSE capability
Contractor Management representative (CMR)	<ul style="list-style-type: none"> Act a representative for the contracting organization Attend scheduled engagement meetings, ensure improvement actions are progressed to completion and support ongoing safeguard assurance efforts 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Supplies required information to Chevron Where contractor is designated as not COEM Qualified, coordinates actions to close gaps Ensures leadership accountability for alignment with Chevron's OE/HSE requirements, safeguard implementation and assurance activities 	<ul style="list-style-type: none"> Reviews COEM process communication package Work with COEM business owner to agree on COEM plan and to ensure execution from their workforce Attends post-award meeting(s) Ensures improvement actions are completed on time Supports development of the bridging document (if required) 	<ul style="list-style-type: none"> Leads their contractor company in the alignment and implementation of Chevron requirements and improvements within their workforce Attends engagement meetings and agrees on action items with COEM business owner Ensures improvement actions are completed on time 	<ul style="list-style-type: none"> Determined by contracting organization

Role	Overall	Consequence Assessment	COEM Capability Assessment	Pre-work	Work-in-Progress	Competencies
Subject matter expert (SME)³	<ul style="list-style-type: none"> Provide support the COEM business owner and/or COEM advisor in all phases of COEM 	<ul style="list-style-type: none"> Supports the completion of the Consequence Assessment 	<ul style="list-style-type: none"> Supports completion of the COEM Capability Assessments in area of expertise, identifying gaps to track to closure through the COEM plan If required, reviews findings and opportunities identified during the COEM Capability Assessment activities 	<ul style="list-style-type: none"> Supports the contract-specific risk assessment and identify required safeguards Supports the COEM business owner conducting the post-award meeting to familiarize the contractor(s) with hazards and safeguards in area of expertise Supports the COEM business owner to define appropriate assurance activities 	<ul style="list-style-type: none"> Supports the COEM business owner as needed to assess contractor capability if new work scopes are added to an existing contract Provides support and expertise on an ad-hoc basis 	<ul style="list-style-type: none"> Technical background in specialized field Knowledge of the applicable OE/HSE regulations, standards, operating procedures and policies in field Relevant field experience or capability to ensure identification of hazards and safeguards in relevant field
Procurement/ Supply Chain Management (P/SCM) representative	<ul style="list-style-type: none"> Supply chain follows the P/SCM pre-award and post-award contracting processes to ensure efficient and effective tender, award and ongoing contractor performance management 	<ul style="list-style-type: none"> Prepares the tender package for new contracts Provides information necessary to complete the Consequence Assessment Participates in the Consequence Assessment as needed 	<ul style="list-style-type: none"> Initiates the COEM Capability Assessment by notifying the COEM advisor and provides the required information Ensures that any gaps identified during the COEM Capability Assessment are documented and communicated to the contractor 	<ul style="list-style-type: none"> Incorporates the completed bridging document (if required) into the contract or service order prior to the start of work as a legally enforceable agreement Documents improvement opportunities identified for contractors designated not COEM qualified or COEM qualified with conditions that must be addressed by contractor prior to start of work 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> See P/SCM processes
Business unit OE governance board, business unit OE leadership team, COEM leadership team or similar⁴	<ul style="list-style-type: none"> Monitor overall COEM business owner performance and ensure they are competent Have the appropriate level of authority and adequate time to perform their COEM duties 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Meet at a frequency determined by the business unit to review COEM metrics Provide general stewardship for the COEM process 	<ul style="list-style-type: none"> N/A
COEM sponsor, OE focus area sponsor, common expectation sponsor or similar⁵	<ul style="list-style-type: none"> Serve as an advocate of the process with the OpCo/business unit Periodically measure process effectiveness and efficiency 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Allocate resources toward COEM stewardship Be accountable for overall implementation of COEM 	<ul style="list-style-type: none"> Understand the COEM process in detail Facilitative leadership skills

¹ The term COEM advisor is a role/responsibility, not a position title. Business units may have COEM advisors that have additional responsibilities beyond COEM. Business units are expected to have resources necessary to support the COEM process. The COEM advisor role may be filled by multiple people (e.g., advisor/co-advisor).

² The term business owner comes from the P/SCM pre-award and post-award contracting process documents. The term COEM business owner was created to align with P/SCM documentation. COEM business owner responsibilities may be fulfilled by different people throughout the COEM workflow. Examples of titles that may fill the COEM business owner role include but are not limited to business manager, project manager, construction manager, field engineer, facility engineer, maintenance supervisor and head operator.

³ The title subject matter expert (SME) is widely used, but not well defined. COEM business owners and COEM advisors are encouraged to engage SMEs whenever needed. The SME responsibilities identified above are examples, but SMEs may also be needed to support other aspects of COEM.

⁴ It is not required for a business unit to have a dedicated COEM leadership team, but business units are free to have a dedicated COEM leadership team if they choose. The responsibilities for this role may be covered by existing general HSE/OE oversight teams/committees.

⁵ It is not required for a business unit to have a dedicated COEM sponsor, but business units are free to have a dedicated COEM sponsor if they choose. The responsibilities for this role may be covered by general/focus area/common expectation sponsors, or other leaders assigned to support COEM stewardship.