



PRESENTED BY  

# WELCOME

# AUDIT PREPARATION TRAINING

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# BREAKFAST SPONSOR



## Thank you!



**MARQUIS**  
INDUSTRIAL SERVICES

Please sign-in here

# INDUSTRY BUSINESS ROUNDTABLE



## Agenda

- Welcome
- Anti-Trust Guidelines
- Member Recognition
- Purpose of SEA
- Timeline
- Process
- Awards and Benefits
- Finalists & Team Leads
- Questions

# INDUSTRY BUSINESS ROUNDTABLE



## IBR Mission

Share innovation and best practices that positively transform the industry and communities where we work.

## IBR Vision

Be the association that collectively adds value to the industry, offering resources for continuous improvement.

Innovation Through Collaboration

# INDUSTRY BUSINESS ROUNDTABLE



## Anti-Trust Guidelines for Conducting Meetings

Industry Business Roundtable (IBR) appreciates your willingness to be an important part of this organization and the services provided to our industry.

The following guidelines shall be followed in conducting meetings of IBR. This is not an exhaustive list of every possible subject to be avoided; in the event you have doubts about the propriety of any matter to be discussed in a meeting, our legal counsel is available for consultation. Generally, the anti-trust laws exclude unlawful combinations or agreements. Sometimes “agreements” may be inferred from conduct. IBR wants to avoid even the appearance of impropriety, and this is the spirit of these guidelines.

- ❖ Do not discuss the prices of goods or services of any particular company(s)
- ❖ Do not disparage the goods or services of any particular company(s)
- ❖ Do not recommend the selection of any particular company as a supplier or customer
- ❖ Do not urge or counsel participating companies to engage in any concerted activity to accomplish any unlawful purpose, i.e., boycotting any company or coercing a company to take some desired action.
- ❖ Do not discuss matters which may be trade secrets or confidential to any company, i.e., don’t engage in “off the record” comments or state matters “not to be repeated outside of this room”.
- ❖ Do not propose secret or “rump” sessions after the official meeting is adjourned to discuss matters that cannot lawfully be discussed at the official meeting.
- ❖ Do not recommend or sponsor the gathering of statistical data, the publishing of standards, or doing joint research without advance written approval of the Operating Committee of IBR.
- ❖ Industry Business Roundtable’s purpose is to educate participating companies, so that every company represented will be better informed and can make its own decisions. IBR members are not required to adopt the IBR recommendations or policies.

Thank you in advance for adhering to these guidelines.

# INDUSTRY BUSINESS ROUNDTABLE



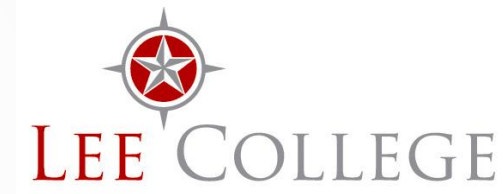
## IBR MEMBERS



*IBR provides a forum for owner and contractor collaboration!  
Developing, sharing, and promoting best practices.*



# PARTICIPATING STUDENTS/COLLEGES



# STUDENT SPONSORS

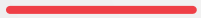


## THANK YOU TO OUR PPE SPONSORS





# Purpose of SEA



# INDUSTRY BUSINESS ROUNDTABLE



## Purpose of SEA - One of the most impactful processes in the Industry

- **Identifies** the best of the best so asset owners know who they want to hire
- **Recognizes** contract company's outstanding SH&E performance
- **Highlights** the company's exceptional Safety Management Systems
- **Provides** peer learning opportunities
- **Fosters** best practice sharing across the industry
- **Encourages** leadership engagement
- **Inspires INNOVATION THROUGH COLLABORATION!**

# PURPOSE OF SEA



## Transformational Change within the Industry

### Safety Excellence Awards (SEA)

The SEA is presented annually to contractors or subcontractors in the Texas Gulf Coast Area who achieve outstanding on-the-job safety that transforms their culture and improves industry safety performance.

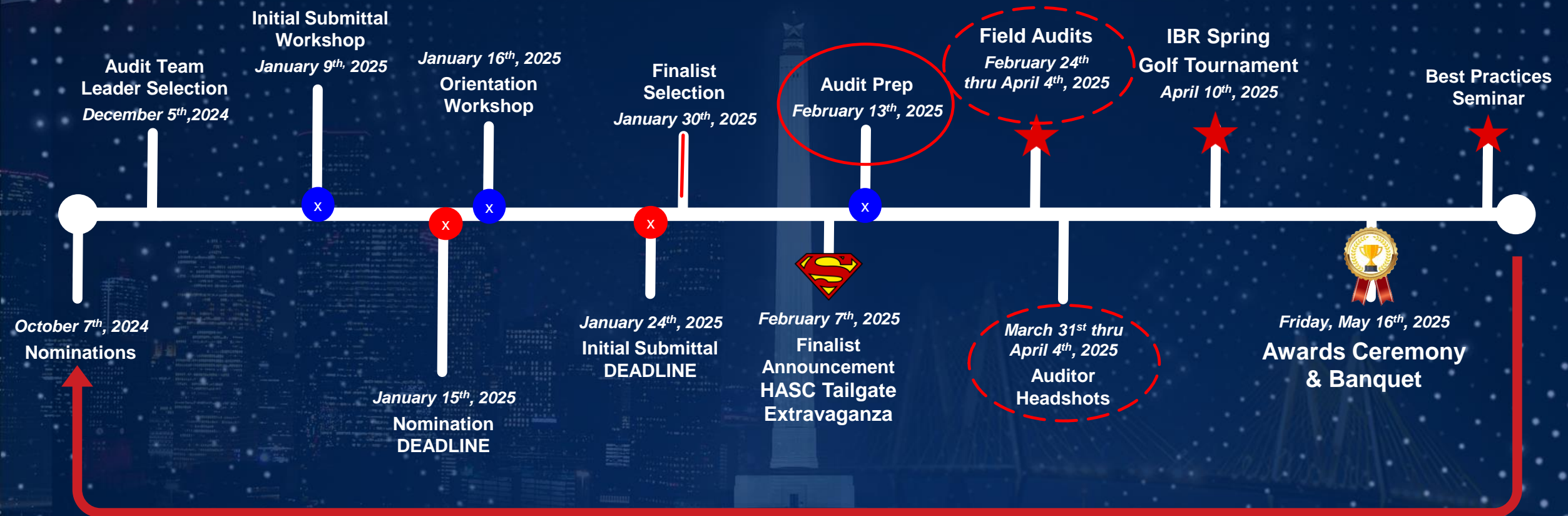
The awards process allows participants to learn through observing other “Best-in-Class” programs through the sharing of best practices.

### 2023 SEA Final Statistics

Finalists	55
Total USA Work Hours	190.5M
Total Recordable Rate	0.21
Nominating Sites	117
Work Hours at Sites	22.7M
Avg. Site Recordable Rate	0.08



# TIMELINE



# INDUSTRY BUSINESS ROUNDTABLE



200 Auditors

30 Mentors

15 Student Volunteers

18 Team Leaders



263  
Volunteers

\*250 + Owner and contractor audit team volunteers collaborate to select the "Best of the Best"



# INDUSTRY BUSINESS ROUNDTABLE

## Audit Team Leader Pictures



Team Leads and audit team members include:

### Asset Owners:

- Plant Managers
- Project Managers
- Safety Managers
- Human Resources
- Contract Administrators
- Maintenance Managers
- Construction Managers
- Operations Managers

### Contractors/Partners:

- Company Ownership
- Senior Operational Leaders
- Safety Professionals
- Most levels of leadership
- Crafts people

At the awards banquet, the magazine has photos of the team members who participated.

## TECHNICAL SUPPORT MEDIUM

### AUDITORS







PRESENTED BY  **hasc**

# AUDITOR PHOTOSHOOT

Schedule your headshot at a location near you.

HASC Texas City – March 31, 2025

HASC Baytown – April 1, 2025

HASC Pasadena – April 2 – 4, 2025

**RESERVE YOUR SPOT!**



[www.calendly.com/SEA2025](https://www.calendly.com/SEA2025)

*Walk-ins Welcome.*



# Audit Process



Deanna Lambert



# INDUSTRY BUSINESS ROUNDTABLE



## Audit Team Leader Contact

The Audit Team Leader will contact the team members and inform them of the:

- Companies to be audited
- Timing of the scheduled audit
- Training and PPE needed to complete the audit
- Please check your schedule and email your Audit Team Leader your availability to attend

# INDUSTRY BUSINESS ROUNDTABLE



## Time Commitments

- Each team will audit 2, 3, or 4 companies.
- Each audit usually begins around 8:00 a.m. and ends around 3:00
- The audits are conducted between **February 24<sup>TH</sup> – April 4<sup>TH</sup>, 2025**
- The team leader will set a schedule for audits based on team member input.
- Please reply promptly to the team leader.
- If you commit to a date, please be on time and if you cannot attend, please inform the team leader ASAP.
- Each team leader must ensure they have enough auditors to properly and consistently evaluate the Finalists.

# INDUSTRY BUSINESS ROUNDTABLE



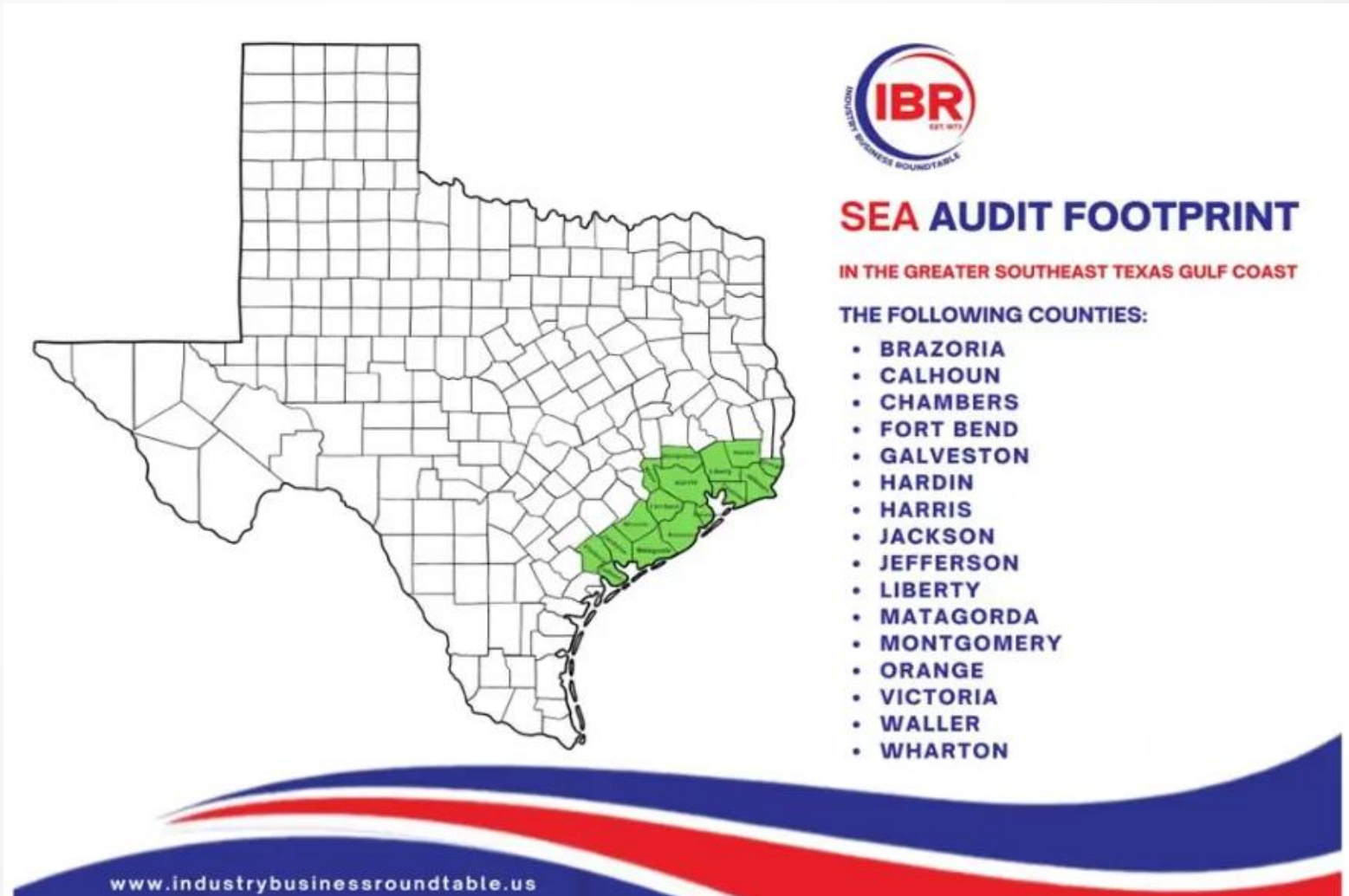
## Audit Process

- Once Audits are completed (Usually 3-4 in each category) Team leads tally scores
  - *Scores determine category winners and runners-up*
    - Best-in-Class
    - Gold
    - Silver
  - *Several companies will compete for "Newcomer of the Year"*
  - *Field Audits to be completed between February 24<sup>th</sup> and April 4<sup>th</sup>, 2025*
- **Winners are announced at the SEA Banquet on May 16<sup>TH</sup> – Moody Gardens, Galveston**
- SEA Best Practices Seminar and Expo held June 12<sup>th</sup>
  - *Best in Class Winners share their Best Practices*

# INDUSTRY BUSINESS ROUNDTABLE



## Audit Footprint





# INDUSTRY BUSINESS ROUNDTABLE



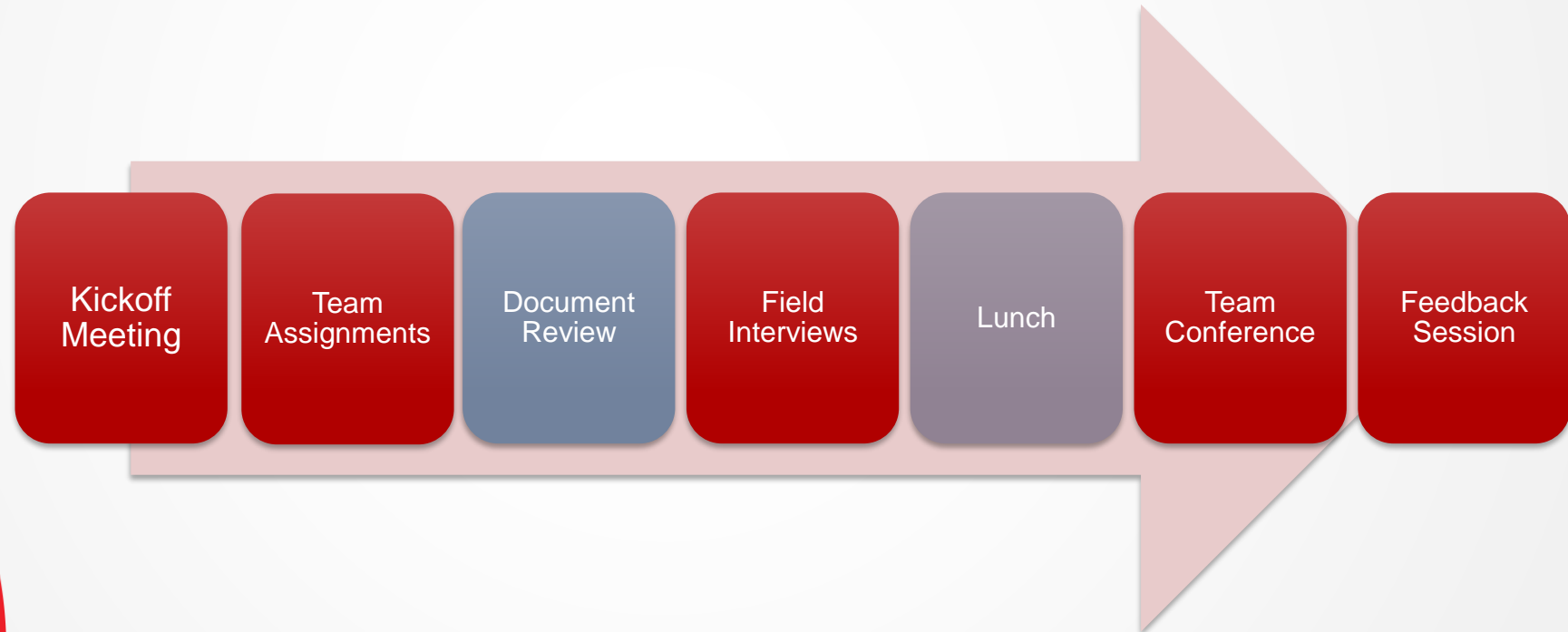
## What to expect during an audit?

- The Team will meet at the designated time.
- The audit will start with an opening conference
- The audit team should take note of the best practices so they can verify during employee interviews
- The team will meet privately so the Team Leader can assign sections
- Assignments for document audit and field verification audit

# INDUSTRY BUSINESS ROUNDTABLE



## Audit Process



**6-8 HOURS**

# FIELD AUDIT/WRITTEN DOCUMENTATION REVIEW



Team	Team Leader evaluates Section 1. It's an overview of all company programs.
Assign	Assign the remaining sections to team members based on their expertise. Keep track using form.
Establish	Establish the scoring guidelines and be consistent through all audits.

# INDUSTRY BUSINESS ROUNDTABLE



## Documentation Audit

- One part of the team will audit the programs. Please be consistent in scoring.
- Review each item on the audit form and score the item according to the scoring criteria.
- Identify and verify “best practices”.
- Take notes of programs as you go so that you can provide feedback to the team on scoring.
- Give input to the audit team leader while the team meets to complete the “master score sheet”.
- You may request additional information from the finalist if not presented in the binders.

# INDUSTRY BUSINESS ROUNDTABLE



## Field Audit Team

**You will use the SEA Audit Form and be assigned sections of the audit form to verify.**

- Congratulate the finalist company on their safety achievement and put them at ease.
- When you interview workers in the field ask about their:
  - Knowledge of the programs.
  - Involvement in the programs.
  - Training they have completed.
- Always be courteous and positive. This is a safety recognition audit, not an OSHA compliance audit.
- Give input to the audit team and team leader when the team meets to complete the “master score sheet”.
- Take good notes to provide great feedback.

# AUDIT TEAM SCORING



- **N/A** Does Not Apply
- **0** No Program
- **1** **Below Average** Partial credit but does not fully meet standards
- **2** **Average** Beginning of a systematic process or effort; average “off-the-shelf” program and/or in place for a short time, with limited documentation.  
*\*If no field verification it shall be downgraded to a 1 - Below Average*
- **3** **Above Average** Sound, systematic process or effort, well integrated into all functions/areas, well-documented, and known to workers through field verification.  
*\*If no field verification it shall be downgraded to a 2 - Average.*
- **4** **Excellent** Sound, systematic process or effort, well-integrated, sustained results, and well-documented, world-class, innovative process that is fully implemented and field verified. The workers are well-versed in the program and buy-in is evident.  
*\*If no field verification it shall be downgraded to a 3 – Above Average*



# AUDIT TEAM WRAP UP



- After completing both the field and the documentation portions of the audit:
  - Meet in private with the audit team.
  - Each team will be assigned a scribe to add comments and transcribe scores for the team-based input from both the field and documentation teams.
  - Keep this feedback positive. Make sure this is a good experience for the finalist.
  - Identify and document any strengths and opportunities for improvement.

**ALL audit results and discussions shall be kept private and confidential**

# INDUSTRY BUSINESS ROUNDTABLE



**LINK** JOHN SMITH - HBR

Management Systems

Company: The Safety Company Category: Crane and Rigging Support Jump To Section: 1. Management Systems

1.1 Management Involvement in Safety Program

☐ Evidence of commitment throughout the organization.

☐ HSE meetings are held on a regular basis at the Senior Management level to review the company's HSE process.

☐ Managers attend work crew safety meetings. (i.e. JSA meetings, Toolbox)

☐ Managers are either present or leading company HSE functions. (i.e. manager lead activities, town hall, sign in)

4 3 2 1 0 NA

Comment

1.2 Written Safety Policy

☐ Evidence that a HSE policy statement exists and displayed conspicuously throughout the organization/facility. The vision is simple, concise and well known across the company.

☐ Policy statement signed by Senior Management and currently dated (3 years).

☐ Employees have a personal copy or have access to a copy of the HSE policy.

4 3 2 1 0 NA

Comment

1.3 Safety Policy Communicated to and Understood by All Employees

4 3 2 1 0 NA

## Scoring

- Audit team members will participate in the grading process.
- Individual items on the audit form will be graded using a scale of 0 to 4 + N/A



- The team leader and scribe will score during the discussion

# Awards and Benefits



Richard Bass

**kuraray**



# INDUSTRY BUSINESS ROUNDTABLE



## Recognition Levels

**BRONZE Level Award:** All companies that submitted for the finalists but did not make the finalists

*All Finalists who are audited will receive one of the following awards based on scoring.*

**SILVER Level Award:** The minimum level of recognition that will be given to a finalist company.

# INDUSTRY BUSINESS ROUNDTABLE



## Recognition Levels

**GOLD Level Award:** The program exceeds the requirements, with above-average best practices

**BEST IN CLASS:** The **ONE** finalist company in each category that is considered to have the most exceptional program and extremely innovative best practices

***NOTE: More than one Contractor can be recognized at various levels.***

***There is only one Best-in-Class in each category!***

*The Team Leader will decide the level based on team input.*

# INDUSTRY BUSINESS ROUNDTABLE



## Other Awards

### **Newcomer of the Year:**

Recognizes contract companies that may be participating for the first time or have not been nominated for at least the past three years.

### **Most Nominations:**

Presented to the company with the most nominations within the IBR audit footprint.

This award recognizes a company with a consistent safety culture that demonstrates world-class safety excellence at a high level across multiple work sites, clients, and industries.



# INDUSTRY BUSINESS ROUNDTABLE



## Why should I be an Auditor?

### **Benefits to the Auditor and their Companies**

- Expand knowledge of Safety Processes from other Contractors and Clients
- Capture new ideas and approaches for managing Safety and Health Programs.
- Learn how other companies prepare and conduct their IBR audits.
- Share Best Practices

# INDUSTRY BUSINESS ROUNDTABLE



## FINALISTS

Company	Category
Hunter On Site	Technical Support Small
GBR Roofing & Sealants, LLC	
Industrial Ground Maintenance	
Vector Controls	Technical Support Medium
Tier 1 Integrity	
FE Moran Special Hazard Systems	
Think Environmental	
Kent	Technical Support Large
Total Safety	
Kelly	
Sunrise Services, LLC	Environmental Small
Shelton Services	
Performance Contracting	Environmental Large
Evergreen North America	
HPC Industrial	
TNT Crane + Rigging	Crane and Rigging
Maxim Crane	
Axis Industries	Soft Crafts Small
AXIOS Industrial	
Marquis Industrial Services	
Excel Modular Scaffold	Soft Crafts Large
Brock	

SPX Cooling Tech, LLC	Hard Crafts Small
Precision Machinery Contractors	
BD Energy	
Tray-Tec, Inc.	
Corpro	Hard Crafts Medium
nVent Thermal LLC	
Superheat	
International Cooling Tower	
Ohmstede	Hard Crafts Large
Turnaround Welding Services	
JVIC	
KCG Industrial	General Contractor Small
Lester Contracting, Inc.	
Moore Industries	
LWL, Inc.	
Force Corporation	General Contractor Medium
Optimal Field Services	
Norrell	
Burrow Global, LLC	
ICS, Inc.	General Contractor Large
PCL Industrial Construction	
Primoris Energy Services	
Worley	
Austin Industrial	General Contractor Extra Large
Brown and Root	
Turner Industries	

# INDUSTRY BUSINESS ROUNDTABLE



## SEA Team Leaders 2024-2025



Sheila Reeves



TECHNICAL SUPPORT **SMALL**



Betty Lawson



TECHNICAL SUPPORT **MEDIUM**



lyondellbasell

Bryan Thompson



TECHNICAL SUPPORT **LARGE**





***kuraray***

**Erin Hance**



**ENVIRONMENTAL SMALL**





**Jeremy Stafford**



ENVIRONMENTAL **LARGE**



lyondellbasell

David Wolf



Chance Rennie



CRANE & RIGGING SUPPORT



**Kate Dean**



**SOFT CRAFT SMALL**





# Jeremy Moore



## SOFT CRAFT **LARGE**



Nouryon

Christopher Byrd



HARD CRAFT **SMALL**



**Ketjen**

**Paul Hernandez**



**HARD CRAFT MEDIUM**





**kuraray**  
Richard Bass



**ExxonMobil**  
Marva Henderson



HARD CRAFT **LARGE**





**Joe Viera**

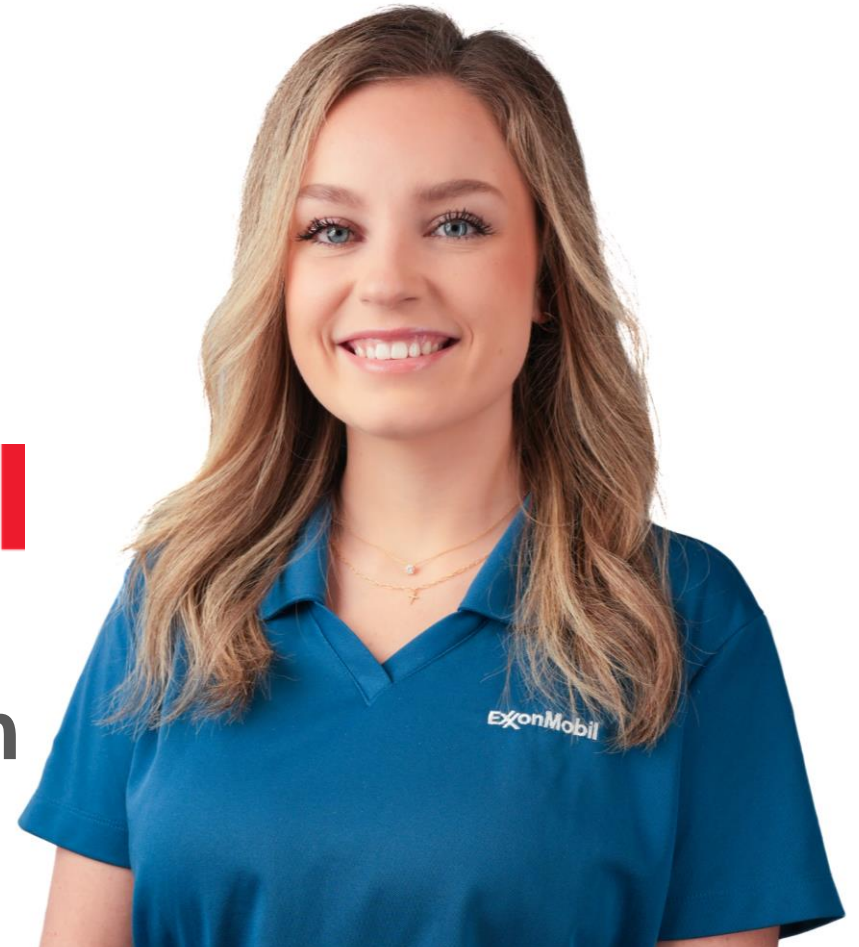


**GENERAL CONTRACTOR SMALL**



Anthony Biello

**ExxonMobil**



Paige Smith



GENERAL CONTRACTOR **MEDIUM**



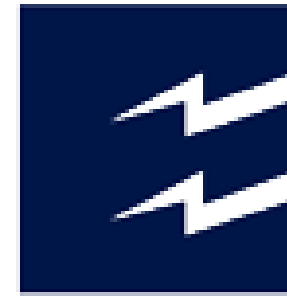
**Celanese**

**John Castaneda**



**GENERAL CONTRACTOR LARGE**





Enterprise  
Products

**John Bollom**



GENERAL CONTRACTOR **EXTRA LARGE**



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**Thank you for your time!**