



Safety Consulting
Specializing in Fatigue & Stress Management
COR Auditing
Owner: Susan Sawatzky
Susan@In-Scope.ca
Office: 780-674-2223
Cell: 403-874-8271

Owner: Susan Sawatzky, B.Ed.

Company Profile

In-Scope Solutions is an independent consulting company working with organizations in all industry areas to develop comprehensive health and safety policies and programs. Specializing in fatigue and stress management, In-Scope has been instrumental in shaping fatigue policies for the Canadian Oil and Gas Industry, as well as for individual companies. In-Scope also specializes in developing and presenting fatigue and stress management safety resources and training to senior leaders, management, supervisors, workers and safety professionals. Other services include external COR auditing, industry research and papers, on-site safety assessments, conference and industry presentations, and project management.

In-Scope Solution Services

Fatigue Risk Management Plan (FRMP) Development and Implementation

- Initial consultation with management, supervisors, workers
- Initial on-site risk assessment
- Management on-boarding presentation
- Creation of FRMP tailored specifically to company needs and designed to fit existing SMS programs
- Management implementation presentation
- Management/Supervisor education and training
- Worker education and training
- Implementation support and assistance
- FRMP review and revision (12 months after implementation)

Resource Development and Training

- Initial consultation to determine company requirements
- Creation of company focused resources
- Resources may include: student workbook, PPT presentations, interactive learning activities, videos, instructor resources, assessments, etc.
- Resources formatted to live presentations, paper copies, or online synchronous or asynchronous learning environments
- Presentation of resources to all required audiences
- Training of instructors to deliver resources and training
- Company ownership of all resources developed

COR External Auditing

- Consultation to determine scope, timelines, budget, etc.
- Comprehensive assessment via documentation review, interviews and site observation tours.
- Complete management of all required project components including communication, budget, timelines, scope, reporting requirements, etc.
- Liaison and consultation with all involved stakeholders
- Competent and consistent review of safety management systems
- Assistance in finding creative and functional solutions to issues encountered
- Stakeholder presentations to describe audit findings
- Complete and submit audit summary report
- Follow up as required

RECENT PROJECTS & EXPERIENCE

CERTIFIED EXTERNAL AUDITING

Certified External COR Auditor: AASP & AMHSA

Alberta

Certified as an External Auditor with an initial certification score of 98%. Recent audit participation includes a national furniture retailer (with 5 locations across Alberta and over 600 provincial employees); an international hydrovac company (auditing 7 locations across Alberta, Saskatchewan, and Manitoba); a national grocery and liquor chain (over 1000 national locations with almost 20 visited in Alberta); a local food manufacturing company (150 employees); a large oil and gas company (500 employees) and a post secondary institution (1500 employees). Currently working as an independent auditor, a team auditor and a lead auditor for larger audits.

UNIVERSITY INSTRUCTOR

University of Calgary

Calgary

Instructing various courses with the University of Calgary in their Continuing Education, Health, Safety and Environment Certificate Program. Currently instructing Fatigue and Stress Management and Business and Leadership for HSE Professionals.

University of New Brunswick

New Brunswick

Instructing for the University of New Brunswick's online Occupational Health and Safety Advanced Diploma Program. Currently instructing Fatigue Management, Psychological Health and Safety, and Safety Management Systems. The program is an asynchronous online learning environment attended by students across the country interested in developing professional skills in health and safety.

FATIGUE POLICY CREATION

Drafting Proposed OHS Fatigue Legislation

Alberta

Created the draft of proposed Fatigue Legislation currently being reviewed for the Alberta Occupational Health and Safety Code. This legislation draft was accompanied by a 'sample' Industry Best Practice on Fatigue for the O&G and Mining Industries. This extensive Fatigue Industry Best Practice document was designed to show the type of industry practices that could be used to support the Legislation should it be adopted. Legislation has passed first review and is proceeding through government channels for consideration of enactment.

Fatigue Variance Negotiation

Yukon

Worked with a major mining company to negotiate a variance with the Yukon Workers Compensation Health and Safety Board (YWCHSB). This company was the third mine to apply for this government variance from the strict new provincial fatigue based HOS legislation recently put into place. To date, this company is the only mine successfully achieving the variance. Meetings with both the senior mine management and the Yukon government were very successful and encouraging with negotiations remaining positive and progressing well.



Fatigue Guiding Principles Agreement for Canadian Oil and Gas Industry Alberta

Created original draft of the Fatigue Guiding Principles Agreement for the Canadian Oil and Gas Industry based on collaborative input from a key O & G Safety Association Industry Initiatives Team and the Fatigue Steering Committee, as well as formal feedback gathered from the Industry Input and Engagement Workshop on Fatigue. This Guiding Principles Agreement was later approved by the Fatigue Steering Committee and ratified by the six key trade associations for the Canadian Oil and Gas Industry.

Fatigue Steering Committee Liaison Alberta

As the direct liaison for the Fatigue Steering Committee, responsibilities included organizing and developing all key Fatigue Steering Committee initiatives in collaboration with the committee chair. Committee work incorporated multiple committee presentations and creation of the 2011 Fatigue Strategy Summaries, the 2012 Fatigue Strategy Initiatives, the 2012 Fatigue Strategy Alignment, the Committee RACI chart and 2012 GANTT timelines.

Industry Input and Engagement Workshop on Fatigue Alberta

Initiated, organized and co-facilitated the 2012 Industry Input and Engagement Workshop on Fatigue that gathered key decision makers in the Canadian Oil and Gas Industry to gain policy building input into Fatigue Risk Management Strategies. This invitation only workshop was attended by executive level decision makers (CEO and VP level of major industry corporations), key representatives of the 6 trade associations, and members of the Fatigue Steering Committee. Developed strategy and key focus questions, presented initial presentation on issues relating to fatigue strategy, collaborated with facilitator throughout the day, and summarized industry feedback and decisions to attendees.

TRAINING & RESOURCE DEVELOPMENT

University of Calgary Calgary

Created the Fatigue and Stress Management course for HSE Professionals for the University. The course will run both online and in class and will be offered two or more times a year. The course provides needed background information and practical strategies to assist safety professionals in managing stress and fatigue in the workplace.

University of New Brunswick New Brunswick

Developed curriculum and asynchronous instructional resources for the University of New Brunswick's OHS Advanced Diploma Program. Have currently developed initial course design and full research and course content for two courses: *Fatigue Management 4270* and *Psychological Health and Safety 4120*. Courses include 39 hours of instruction time, activities, 3 formal assessment measures and a concluding project/assignment.

'Stressed for Success' Workplace Stress Training Alberta

This workplace stress training focuses on practical strategies for managing stress in the workplace and at home. Offered as a Lunch and Learn (1 hour) presentation or as a ½ or full day workshop, this session teaches people how to understand, manage, and even value the stress in their lives. It provides insight into what causes stress and empowers attendees to take control of their stress to improve their health and their happiness.

BCRSP Management Systems Study Guide

Canada

Co-created the BCRSP approved Study Guide for Management Systems. This is the main resource for all safety professionals looking to review required information for the CRSP Certification Examination. The project involved assessing and revising existing content to reflect new domains and competency criteria. New content was developed and approved by the BCRSP Advisory Committee. This project was completed with a co-writer.

Fatigue Training for Supervisors

Yukon

This complete training session is designed to teach mine supervisors the necessary skills to: understand the risks and hazards associated with fatigue, to understand the causes and effects of fatigue, and to successfully implement a 5 Level Fatigue Risk Management Plan designed to mitigate the risks of fatigue in the underground mining operations. The resource includes a training resource manual, Power Point presentation, and related activities.

Fatigue Training for Workers

Yukon

This training resource focuses on teaching workers to understand that fatigue is not "just a little tired". Hazards and risks associated with working while fatigued are outlined. Workers are taught to understand the causes and effects of fatigue and are given several assessment tools to quantitatively measure fatigue levels. Mitigation strategies are clearly outlined and the steps they need to follow for the 5 Level Fatigue Risk Management Plan are detailed. The resource includes a training resource manual, Power Point presentation, related activities, assessment, and follow up tool box talks.

Construction Safety Course

Alberta

Created a credit based online introductory course focused on construction safety. This 25 hour course is designed for youth and adults planning to apprentice in the construction trade. The course covered Hazard Identification, Assessment and Evaluation, Ladder Safety, Fire Safety, Understanding Scaffolds and WHMIS.

Major Oil Company Hazard Identification Training Resource

Alberta

Collaboratively created a comprehensive training program on hazard identification and control for a leading Canadian oil company. The 8 hour training program includes student and instructor training materials, visual presentation materials, formal assessment materials, and field application activities.

Guideline Development

Alberta

Managed guideline development and revision work for the following Canadian Oil and Gas Industry guidelines: Fatigue Guide for Employers, Fatigue Guide to Safe Work (for workers), Slips, Trips and Falls Guide to Safe Work (for workers), Return to Work Employers Guide.

Safety Stand Down Resources and Online Toolbox

Alberta

Collaboratively created a variety of resources for the 2012 Safety Stand Down Campaign including Tool Box Talks, PPT presentations, Facebook pages, industry recognition strategies, and worker feedback forms. Online Communication Tools were presented to industry at Lunch and Learn Events across the province.

Resource Development Awards

Alberta

Have received the following awards for Resource Development and Program Presentations: Top Act to Follow Award 2009 (member of team awarded), Semi-Finalist for the Excellence in Teaching Award 2008, BP Energy Scholarship Program 2008, A+ for Energy \$10 000 Grant Award Winner 2008, Argyll Centre's FIGHT 4 Earth Ambassador of the Year 2008.

CONFERENCE AND PROFESSIONAL PRESENTATIONS

City of Edmonton Safety Day Keynote

Edmonton

Presented on Fatigue Management to over 350 employees attending the City of Edmonton's Safety Day. The topic was well received and feedback was positive.

City of Edmonton Health and Wellness Fair

Edmonton

Presented on Sleep Health and Wellness at the City of Edmonton's Employee Health and Wellness Fair held at City Hall.

Provincial Health and Safety Conference

Edmonton

Presented on Fatigue Management at the Provincial Health and Safety Conference held at the Shaw Conference Centre. Presented to over 150 delegates on fatigue factors and current understandings in Managing Fatigue

National Safety Conference

Mississauga

Presented "Waking up to Fatigue Factors" at the upcoming HSO Partners in Prevention National Conference on Health and Safety. This presentation highlighted organizational assessment methods for fatigue risk exposures and practical fatigue safety management system implementation guidelines.

HIRA (Human Resources Institute of Alberta)

Edmonton

Presented on how to manage fatigue in the workplace to HR Professionals attending the HRIA Provincial Conference. The presentation identified fatigue's impact on productivity and employee wellness and provided numerous solutions for mitigating these issues.

DOW Chemical

Prentice

Conducted numerous presentations on Fatigue Safety to Senior Leadership, Shift workers working day/night shifts and Office Staff. Presentations were designed to inform of H&S fatigue risks, as well as organizational and individual strategies available.

Nova Scotia Safety Conference

Halifax

Presented "Waking up to Fatigue Factors" at the Safety Services Nova Scotia Conference. This presentation highlighted organizational fatigue risk exposures and solutions as well as increasing knowledge about individual fatigue management competency building.

Pason Systems

Calgary

Conducted a workshop to assist senior safety leadership in developing comprehensive fatigue solutions for existing operations. The workshop consisted of informational presentations and various assessment activities with senior safety managers. A follow-up presentation, consultation, peer industry research and an in-depth Fatigue Strategy Report were provided including comprehensive operational solution suggestions addressing identified fatigue risks.



EPCOR

Edmonton

Conducted informational safety presentations on fatigue to various EPCOR employees and managers as part of their annual safety events. Presentations focused on strategies workers could use to manage fatigue when working long hours and late nights.

AOHNA (Alberta Occupational Health Nurse Association)

Calgary

This two hour presentation to AOHNA representatives at the Bow Building in Calgary focused on understanding the dual nature of fatigue in nursing and fatigue in client industry organizations. This presentation focused on improving fatigue awareness and improving fatigue management competency.

Canadian Society of Safety Engineers

Hinton, Edmonton, Calgary

Enjoyed presenting to safety engineers from various industries at the various Chapters across the province. These presentations focused on understanding health and safety in relation to fatigue, the science and underlying factors contributing to fatigue, and organizational assessment and mitigation techniques.

Fortis

Alberta

Presented across the province to Fortis workers regarding the health and safety risks of fatigue as well as various strategies workers could employ to manage fatigue risks when working long hours.

Worker's Compensation Board Safety Conference

Calgary

Presented "Waking Up to Fatigue Factors in the Workplace" to representatives of various industries. The presentation focused on increasing professional competency in understanding how fatigue influence health and safety in the workplace and how it needs to be included in back-to-work accommodations.

Occupational Health & Safety Conference

Calgary

Presented "Waking Up to Fatigue Factors in the Workplace" to representatives of various industry groups. The presentation focused on increasing professional competency in recognizing and mitigating organizational fatigue risks. Industry trends regarding fatigue management were presented to demonstrate various approaches used. Organizational and individual management strategies were provided.

Yukon Workers Compensation Health and Safety Board

Yukon

Successful presentation of fatigue concepts and their application to the variance a major mining company is negotiating for their underground mining operations. Consultation process to ensure the plan, implementation, and overall strategy meet both the mine and WCB requirements occur through regular quarterly meetings.

Safety Stand Down Lunch and Learns

Alberta

Industry presentations on the 2012 Safety Stand Down online toolbox resources were delivered to over 300 industry representatives at four separate Lunch and Learn events held in Calgary, Red Deer and Edmonton.

Executive Level Fatigue Risk Management Strategy Presentation

Alberta

Presented key research findings on current fatigue concerns within the Canadian Oil and Gas Industry, Fatigue Risk Management Strategies created by other industries, and current fatigue research understandings. Presented to executive level decision makers in the Canadian Oil and Gas Industry, key industry association representatives, and members of the Fatigue Steering Committee.



ON-SITE SAFETY ASSESSMENTS

Copper Mine Site

Yukon

Conducted a two day fatigue hazard assessment at a large copper mine site. This hazard assessment reviewed the following fatigue risk factors: mental and physical work demands, work scheduling and planning, environmental conditions and individual and non-work factors. Risk assessment results were graphed and quantified and presented to both senior mine management and the Yukon government (YWCHSB). Results were used to create the 5 Level Fatigue Risk Management Plan.

On-Site Pump Jack Industry Safety Assessments

Alberta, BC, Saskatchewan

On-site safety assessments focused on a formal hazard assessment and task analysis of industry safety practices for work on and around pump jacks. Site visits to 16 worksites across three provinces were conducted with 6 prime contractors and 9 service provider companies. Over 59 worker interviews and 12 supervisor interviews were conducted. Field notes and photo logs from the worksites visited were used to create the Occupational Health and Safety Risk Assessment Final Research Report and to present findings to the Beam Pump Safety Guideline Development Committee.

RESEARCH AND INDUSTRY REPORTS

Client Research on Fatigue Management

Alberta

Conducted research examining fatigue management practices of industry peers for an O&G service company client. Information gathered on current and best practices regarding fatigue management was utilized to assist in designing targeted fatigue control solutions for identified fatigue risk exposures.

Technical Paper

International

Created a technical paper designed on illustrating rationale and methodology for the clients executive level clientele. That paper focused on explaining assessment methodology, that interpretation, competency development, and data utilization of the clients international regulatory assessment process.

Fatigue Research

Alberta

Completed a multiphase research project in preparation for the Industry Input and Engagement Workshop on Fatigue. Research included current scientific and industry research on fatigue and review of over 50 industry based fatigue reports, with special focus placed Fatigue Risk Management Strategy (FRMS) policies from other industries. A straw document of components of other industry FRMS was completed and shared with industry. A summary of key findings was presented to executive level decision-makers, key industry association representatives, as well as members of the Fatigue Steering Committee.

Pump Jack Research

Alberta, BC, and Saskatchewan

Conducted extensive industry background research regarding pump jacks in the Western Canadian Sedimentary Basin. Initial research included multiple industry interviews, two days of Lufkin Pump Jack Training School, discussions with OHS specialists, and training instructor interviews. Research assessed applicable legislation across Alberta, BC, and Saskatchewan. This research was used to create the Beam Pump Safety Project, Initial Fact Finding Report and to complete the Beam Pump Safety Project phase one on-site safety assessments. Follow up research included beam pump manufacturer interviews and interviews with multiple producer (CAPP) and service provider (PSAC) company representatives.



PROJECT MANAGMENT

Beam Pump Safety Project Manager

Alberta

Managed this project from writing the initial Creative Sentencing grant proposal submission, to the complete development of the comprehensive three phase project. Project work also included creation of the project charter, executive summary, GANTT timeline, and all related project strategy and documentation. Completed initial industry research, coordinated site visits for a variety of consultants working on the project, and completed pump jack on-site safety assessments. Phase two of this project will include liasoning with a development committee focused on creating an industry guideline on beam pump safety.

Fatigue Portfolio Manager

Alberta

Managed the Fatigue Portfolio including all communications with a large O & G industry association advisory committee (board of directors) regarding portfolio initiatives and progress. The key fatigue related industry initiatives developed within this portfolio were 3 industry focused workshops attended by over 180 industry representatives, creation of the 2012 Fatigue Strategy Initiatives, leading initiatives with the Fatigue Steering Committee, and development of the Fatigue Guiding Principles Agreement.

Community Development Trust Fund Grant Project Management

Alberta

Management of this project included liasoning with key government representatives, supervising the translation of several Guides to Safe Work documents into both Spanish and French, supervising industry review of multiple O & G Industry Guideline and Industry Recommended Practice documents to better understand industry response and usage of these important guidelines. A 350 page final report and comprehensive audit were submitted to Alberta Human Services to successfully complete this grant project.