

ESTVOLD OILFIELD SERVICES

JOB COMPETENCY POLICY

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 Title: Job Competency Policy
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Policy Control Item	Policy Information
Company	Estvold Oilfield Services
Document Type	Policy / Program Manual / Field Forms / Competency and Audit Package
Applies To	All employees, supervisors, contractors where applicable, company-controlled worksites, vehicles, shops, yards, customer sites, and operational activities
Program Intent	Competency verification, training management, qualification consistency, operational readiness, employee development, and continuous improvement
Revision	Comprehensive V2 - Editable Master
Approval	Management / HSE / Operations

INCLUDED IN THIS PACKAGE

- Expanded Job Competency policy manual
- Roles, responsibilities, and accountability expectations
- Training, qualification, and competency verification process
- Job task qualification matrix and supervisor observation tools
- Refresher training, restrictions, and qualification limitation guidance
- Trend analysis, KPIs, audit expectations, and management review
- Stop Work Authority and competency concern escalation process
- Contractor and third-party competency expectations
- Comprehensive forms package and logs

DOCUMENT CONTROL

Revision	Date	Description of Change	Approved By
0	Initial Release	Original controlled document issue	Management
1	Current Draft	Expanded job competency manual and forms package	Management
2	Current Revision	Comprehensive program language, qualification management, competency evaluation, tracking logs, and audit tools expanded	Management / HSE / Operations

This document is considered a controlled safety management document. Printed copies are considered uncontrolled unless verified current through the company safety management system or authorized document control location.

DISTRIBUTION AND CONTROL

Controlled copies may be distributed to HSE, operations management, field supervision, training coordinators, company shared safety systems, client-required safety documentation platforms, and field locations where competency verification activities are implemented.

HOW TO USE THIS MANUAL

- Use Sections 1-24 as the governing program standard.
- Use the Supervisor Quick Response Guide during competency concerns, task assignment, or qualification review.
- Use Forms A-L as field-ready documentation tools for training, qualification, verification, and follow-up.
- Review qualification gaps and competency trends monthly with accountable owners and due dates.
- Use the program to support development and operational readiness, not to create fear or discourage employees from requesting help.

TABLE OF CONTENTS

1. Purpose and Policy Statement
2. Scope and Application
3. Regulatory Alignment and References
4. Definitions
5. Program Philosophy and Core Principles
6. Roles and Responsibilities
7. Training and Qualification Requirements
8. Competency Evaluation Expectations
9. Job Task Qualification Requirements
10. Refresher Training Expectations
11. Supervisor Observation and Verification Expectations
12. Work Restriction and Qualification Limitations
13. Competency Hazard Recognition
14. Critical Task Competency Categories
15. Employee Development and Improvement Expectations
16. Stop Work Authority
17. Contractor and Third-Party Expectations
18. Documentation and Recordkeeping
19. Incident Reporting and Investigation
20. Training Requirements
21. Trend Analysis, KPIs, and Data Review
22. Leadership and Supervisor Accountability
23. Auditing and Program Review
24. Supervisor Quick Response Guide
25. Forms Package



1. PURPOSE AND POLICY STATEMENT

Estvold Oilfield Services is committed to ensuring employees, supervisors, contractors, and personnel performing work on behalf of the company possess the training, knowledge, skill, judgment, and operational competency necessary to perform assigned duties safely. Competency is a core part of preventing injuries, environmental events, equipment damage, customer concerns, and operational failures.

The Job Competency process is intended to verify that personnel understand hazards, procedures, equipment limitations, communication expectations, emergency response actions, and the boundaries of their qualifications before performing work independently. The company recognizes that competency is developed through training, field experience, supervision, coaching, verification, refresher training, and continuous review.

No production expectation, operational pressure, schedule demand, customer request, or client expectation shall take priority over employee safety or qualification requirements. Employees are expected to stop, ask, reassess, and request clarification when they are unsure of a task or when qualifications cannot be verified.

2. SCOPE AND APPLICATION

This policy applies to all Estvold Oilfield Services employees, temporary workers under company supervision, supervisors, management personnel, contractors where applicable, and company-controlled worksites. It applies to any task where training, qualification, experience, or practical demonstration is necessary to perform work safely.

The process applies to field operations, equipment operation, safety-sensitive work activities, environmental operations, maintenance activities, vehicle operations, emergency response activities, and operational job tasks requiring formal or task-specific qualification. This program complements JSAs, observations, audits, incident investigations, corrective action processes, client requirements, and leadership engagement activities.

3. REGULATORY ALIGNMENT AND REFERENCES

This policy is written to align with recognized occupational safety principles including OSHA competency expectations, training verification principles, safe work qualification requirements, employee involvement principles, incident prevention concepts, and human performance improvement practices.

This program does not replace OSHA compliance requirements, customer site rules, company procedures, DOT requirements, equipment manufacturer instructions, or task-specific regulatory standards. Where another requirement is more stringent, the more protective requirement shall apply.

4. DEFINITIONS

Competency: Demonstrated ability to perform assigned work safely and effectively based on training, knowledge, practical skill, hazard recognition, communication, and field judgment.

Qualification: Verified authorization to perform a specific task, operate equipment, or perform an operational activity independently.

Refresher training: Additional instruction or evaluation provided to maintain, restore, or improve operational competency.

Competency limitation: A restriction or boundary placed on work activity when training, qualification, supervision, or medical status does not support independent task performance.

Verification: Documented review confirming that required training, field observation, and practical demonstration have been completed.

5. PROGRAM PHILOSOPHY AND CORE PRINCIPLES

The Estvold Oilfield Services Job Competency process is based on the belief that employees generally want to perform work safely, but need clear expectations, adequate training, practical coaching, and verification before being assigned independent tasks. Competency management shall be used as a development and risk-reduction process rather than a blame process.

The process is most effective when employees trust that asking questions or identifying qualification limitations will be supported. Supervisors shall encourage employees to speak up when unsure, request additional instruction, or stop work when competency concerns exist.

- Competency verification shall occur before independent task assignment.
- Employees shall not be placed in work activities beyond documented qualification or demonstrated ability.
- Practical field observation is required where classroom training alone is not enough to verify competency.
- Refresher training shall be provided when procedures change, incidents occur, or performance gaps are identified.
- Qualification records shall be maintained so supervisors can make informed work assignment decisions.

6. ROLES AND RESPONSIBILITIES

Employees are responsible for participating in required training, communicating qualification limitations, following procedures, requesting clarification when needed, participating in competency evaluations, and using Stop Work Authority when work cannot be performed safely. Employees shall not misrepresent training status, qualification level, or ability to perform safety-sensitive tasks.

Supervisors are responsible for verifying employee qualifications before assigning work, monitoring field performance, documenting competency observations, coordinating refresher training, correcting competency deficiencies, and ensuring employees are not directed to perform work beyond their documented qualification.

Management is responsible for providing resources, supporting training systems, reviewing competency trends, removing barriers to development, reinforcing accountability, and ensuring the competency process is not used as a shortcut for production pressure.

HSE and training personnel are responsible for supporting training content, forms, qualification records, audits, program review, trend analysis, and consistency across departments.

7. TRAINING AND QUALIFICATION REQUIREMENTS

Employees shall complete required training and qualification activities before performing assigned tasks independently. Training may include classroom instruction, hands-on evaluation, field observation, mentoring, JSA review, manufacturer instructions, client requirements, and practical demonstration of competency.

Training completion alone does not automatically equal competency. Supervisors shall verify that employees can apply training correctly under field conditions before authorizing independent work.

Qualification Step	Expectation
Identify Task	Determine whether the task requires formal training, field verification, client qualification, or supervisor authorization.
Train	Provide classroom, field, manufacturer, client, or task-specific instruction as applicable.
Observe	Monitor employee performance during actual or simulated work activity.
Demonstrate	Require the employee to demonstrate safe task performance and hazard recognition.
Document	Record training, qualification status, limitations, and required follow-up.
Authorize	Allow independent work only after competency is verified and documented.

8. COMPETENCY EVALUATION EXPECTATIONS

Competency evaluations shall verify employee understanding of hazards, procedures, operational expectations, communication requirements, PPE, emergency response, equipment limitations, and safe work practices. Evaluations shall be conducted professionally and with enough detail to determine whether the employee can safely perform the assigned task.

A quality competency evaluation should include meaningful work activity, clear performance expectations, employee input, practical demonstration, and documentation of any restrictions or additional training needs.

- Evaluate knowledge of task hazards and critical controls.
- Verify ability to follow applicable procedures and JSAs.
- Confirm PPE selection and use.
- Observe communication, body positioning, and hazard recognition.
- Document limitations, coaching, or additional training requirements.

9. JOB TASK QUALIFICATION REQUIREMENTS

Job task qualification requirements shall be identified for operational activities that involve elevated risk, customer requirements, specialized equipment, regulatory expectations, or safety-sensitive work. Employees shall not perform these tasks independently until qualification requirements are completed and verified.

Task Category	Competency Expectations	Example Verification
Equipment Operation	Operator understands inspection, controls, limitations, hazards, and emergency shutdown.	Practical evaluation and supervisor sign-off.
Vehicle Operations	Driver understands defensive driving, load securement, backing, weather, and fatigue controls.	Driving review and records verification.
Confined Space / Hot Work	Employee understands permits, atmospheric hazards, isolation, PPE, and rescue expectations.	Permit review and field observation.
Environmental Response	Employee understands spill control, waste handling, reporting, and PPE expectations.	Scenario review and response drill.
High-Risk Field Tasks	Employee demonstrates hazard recognition, communication, and critical control use.	JSA review and practical demonstration.

10. REFRESHER TRAINING EXPECTATIONS

Refresher training may be required when procedures change, incidents occur, unsafe work is observed, qualification lapses occur, client requirements change, equipment changes, or operational deficiencies are identified. Refresher training shall address the specific gap identified and shall include verification that the employee understands the corrected expectation.

- Procedure or regulatory change.
- Incident, near miss, or serious good catch involving competency concerns.
- Repeated unsafe behavior or observation trends.
- Extended time away from a task or equipment type.
- Supervisor or employee request for additional support.

11. SUPERVISOR OBSERVATION AND VERIFICATION EXPECTATIONS

Supervisors shall observe work performance, evaluate operational competency, verify understanding of procedures, and intervene when competency concerns are identified. Observation shall be conducted during actual work when it is safe and practical to do so.

The supervisor should ask questions before assuming why a performance gap occurred. Competency issues may result from unclear procedures, inadequate training, unfamiliar equipment, communication barriers, fatigue, production pressure, or lack of field experience.

Observation Area	Satisfactory Evidence
Procedure Knowledge	Employee can explain task steps, hazards, and critical controls.
Practical Skill	Employee performs the task safely without bypassing controls.
Communication	Employee confirms instructions, uses clear hand signals, and asks questions when uncertain.
Hazard Recognition	Employee identifies changing conditions and uses Stop Work Authority when needed.
Documentation	Training records and qualification status support the assigned task.

12. WORK RESTRICTION AND QUALIFICATION LIMITATIONS

Employees shall not perform tasks beyond documented qualifications, training level, medical restrictions, or operational authorization. Supervisors shall review qualification limitations before assigning safety-sensitive work and shall ensure employees understand the boundaries of their authorization.

When competency limitations are identified, work shall be reassigned, additional supervision provided, or the task stopped until qualification can be verified.

13. COMPETENCY HAZARD RECOGNITION

Potential competency concerns may include lack of training, insufficient experience, poor communication, unsafe work practices, inability to follow procedures, inadequate hazard recognition, unfamiliar equipment, expired qualifications, or failure to understand operational requirements. Employees shall recognize that inadequate competency may create serious injury exposure even when the task appears routine.

- Employee cannot explain hazards or controls.
- Employee has not completed required training or refresher training.
- Employee is unfamiliar with equipment or site-specific expectations.
- Employee repeatedly requires correction on the same task.
- Employee is assigned work outside documented qualification limits.

14. CRITICAL TASK COMPETENCY CATEGORIES

Category	Examples of Required Competency	Examples of Concern
PPE / Hazard Controls	Selects task-specific PPE and explains why it is required.	Uses incorrect PPE or cannot explain exposure controls.
Equipment Operation	Inspects equipment and operates within limitations.	Operates without authorization or ignores defects.
Procedures / Permits	Follows JSA, permit, LOTO, and customer rules.	Skips steps or performs task without required authorization.
Communication	Uses clear instructions and confirms changes.	Makes assumptions or fails to communicate changing conditions.
Emergency Response	Knows alarms, evacuation, first response, and reporting expectations.	Cannot identify emergency actions or contact process.
Environmental Controls	Understands spill, waste, and containment expectations.	Improper handling, storage, or reporting of environmental hazards.

15. EMPLOYEE DEVELOPMENT AND IMPROVEMENT EXPECTATIONS

Employee development activities may include refresher training, mentoring, practical demonstrations, field evaluations, coaching, qualification review activities, and increased supervision. The goal is to build capability and confidence while maintaining operational safety.

Development plans shall include clear expectations, responsible personnel, target dates, and verification criteria. Employees shall be given a reasonable opportunity to ask questions and request support when development needs are identified.

16. STOP WORK AUTHORITY

All employees and contractors have the authority and responsibility to stop work when competency concerns exist, qualifications cannot be verified, procedures are unclear, employees are assigned work beyond their authorization, or serious injury exposure exists.

Employees shall not face retaliation for exercising Stop Work Authority in good faith.

Stop Work Trigger	Required Action
Qualification cannot be verified	Pause work, review records, and obtain supervisor authorization before continuing.
Employee unsure how to perform task safely	Stop work, ask for clarification, and provide coaching or training.
Procedure or instruction is unclear	Pause work, clarify expectations, and update the JSA if needed.
Safety-sensitive task assigned to unqualified employee	Reassign work or provide qualified supervision until competency is verified.
Repeated competency concern identified	Escalate to supervision, training coordinator, and management as needed.

17. CONTRACTOR AND THIRD-PARTY EXPECTATIONS

Contractors working on company-controlled sites are expected to maintain required qualifications, training documentation, competency verification, and safe work practices. Contractor competency expectations shall be communicated before work begins and verified where contractor activities affect company employees, customer operations, or high-risk tasks.

Immediate serious competency concerns involving contractors shall be stopped regardless of employer. Contractor trends may be reviewed with operations, customer representatives, or contractor management as appropriate.

- Contractors shall provide qualification documentation when required.
- Contractor personnel shall follow site-specific training and orientation expectations.
- Contractor competency concerns shall be documented and escalated to the contractor supervisor.
- Repeated deficiencies may result in corrective action, removal from site, or additional qualification review.

18. DOCUMENTATION AND RECORDKEEPING

The company shall maintain qualification records, competency evaluations, training documentation, corrective action records, audit documentation, refresher training records, employee development records, and supervisor observation documentation. Records shall be retained according to company retention requirements, client requirements, or applicable regulatory expectations.

Record Type	Minimum Content
Competency Evaluation Form	Task evaluated, employee, supervisor, observed performance, restrictions, follow-up.
Training Verification Checklist	Required training, qualification status, refresher dates, documentation review.
Qualification Matrix	Employee name, task qualification, expiration, restrictions, supervisor approval.
Corrective Action Log	Action, owner, due date, completion date, verification.
Program Review Summary	Trends, gaps, training needs, management review, improvements.

19. INCIDENT REPORTING AND INVESTIGATION

Competency-related incidents, qualification deficiencies, unsafe work practices, communication failures, or operational concerns shall be reported immediately. Incident reviews shall identify contributing factors, training deficiencies, work planning concerns, communication issues, supervision quality, procedure clarity, and corrective actions.

Incident investigations shall evaluate whether employees were trained, qualified, authorized, and adequately supervised for the task performed. Findings shall be used to improve the competency process and prevent recurrence.

20. TRAINING REQUIREMENTS

Training may include operational procedures, hazard recognition, communication expectations, equipment operation, emergency response, stop work authority, qualification management requirements, and task-specific competency expectations. Training shall be provided before task assignment and refreshed as needed based on performance, changes, or incident learning.

Training Audience	Training Topics
All Employees	Program intent, qualification expectations, Stop Work Authority, reporting, employee responsibilities.
Supervisors	Competency verification, field observation, documentation, coaching, qualification limitations.
Managers	Resource support, trend review, barrier removal, program review, accountability.
HSE / Training	Program administration, audit, training support, records, trend analysis.
Contractors	Site expectations, hazard communication, qualification documentation, task authorization.

21. TREND ANALYSIS, KPIS, AND DATA REVIEW

Competency data shall be reviewed periodically to identify recurring training gaps, qualification limitations, unsafe work trends, employee development needs, documentation weaknesses, and department-specific exposure concerns. Monthly review shall focus on learning and improvement. Data shall not be used to discourage reporting or penalize employees for asking for support.

Metric	Purpose
Qualification Completion	Confirms employees are authorized for assigned tasks.
Refresher Training Status	Identifies expired or upcoming refresher needs.
Competency Evaluation Quality	Confirms practical field verification is meaningful.
Observation Trends	Identifies recurring performance gaps before incidents occur.
Corrective Action Closure	Confirms development actions are completed and effective.
Incident Linkage	Shows whether competency gaps contributed to events.

22. LEADERSHIP AND SUPERVISOR ACCOUNTABILITY

Leadership personnel shall participate visibly in the Job Competency process through field interaction, qualification review, trend evaluation, corrective action support, and training resource allocation. Leadership engagement is essential because employees judge the value of competency expectations by what leaders do, not what the program says.

Leadership Expectation	Evidence of Completion
Field Presence	Documented leadership observations and crew conversations.
Barrier Removal	Training resources provided and qualification gaps addressed.
Trend Review	Monthly competency summaries reviewed with operations and HSE.
Development Support	Employees receive coaching, mentoring, and refresher opportunities.
Accountability	Repeated gaps addressed through supervision and system improvement.

23. AUDITING AND PROGRAM REVIEW

The company shall periodically review qualification records, competency evaluations, corrective action effectiveness, training completion, documentation quality, incident trends, employee feedback, and program consistency. The audit shall evaluate whether the program is improving operational readiness and preventing unqualified task assignment.

Audit Item	Satisfactory Evidence
Qualification Records	Current, complete, and accessible for supervisor review.
Evaluation Quality	Forms show practical observation, employee input, and clear status.
Refresher Training	Training is assigned and completed when gaps are identified.
Corrective Action Closure	Actions have owners, due dates, and verification.
Employee Trust	Employees ask questions and report competency concerns without fear.

24. SUPERVISOR QUICK RESPONSE GUIDE

Situation	Immediate Action	Key Documentation / Control
Qualification concern identified	Stop work and review competency before task continues.	Evaluation form / qualification matrix
Unsafe work practice observed	Coach employee and review training expectations.	Observation form / corrective action
Training deficiency identified	Coordinate refresher training and document completion.	Training checklist
Employee exceeds qualification limitation	Suspend activity immediately and reassign work if needed.	Qualification matrix / supervisor review
Competency-related incident occurs	Initiate investigation and evaluate training, supervision, and authorization.	Incident review form

25. FORMS PACKAGE

The following forms are provided as editable templates. The company may convert these forms into electronic format, fillable PDF, shared drive logs, or safety management software entries as needed.

FORM A - JOB COMPETENCY EVALUATION FORM

Item	Details / Comments
Date	
Employee Name	
Supervisor	
Task Evaluated	
Training Completed	
Competency Verified	
Restrictions Identified	
Additional Training Required	
Employee Comments	
Supervisor Signature	

FORM B - TRAINING VERIFICATION CHECKLIST

Item	Yes	No	Comments
Required training completed	<input type="checkbox"/>	<input type="checkbox"/>	
Qualification current	<input type="checkbox"/>	<input type="checkbox"/>	
Refresher training current	<input type="checkbox"/>	<input type="checkbox"/>	
Supervisor verification completed	<input type="checkbox"/>	<input type="checkbox"/>	
Documentation current	<input type="checkbox"/>	<input type="checkbox"/>	
Employee understands task hazards	<input type="checkbox"/>	<input type="checkbox"/>	
Employee understands emergency expectations	<input type="checkbox"/>	<input type="checkbox"/>	

FORM C - EMPLOYEE QUALIFICATION MATRIX

Item	Details / Comments
Employee Name	
Department / Crew	
Task Qualification	
Training Date	
Expiration / Review Date	
Restrictions	
Supervisor Approval	
Status	

FORM D - SUPERVISOR COMPETENCY OBSERVATION FORM

Item	Details / Comments
Date	
Employee / Crew	
Task Observed	
Hazards Discussed	
Procedure Understanding	
PPE Understanding	
Communication Quality	
Competency Concern	
Coaching Provided	
Follow-Up Required	

FORM E - REFRESHER TRAINING REVIEW FORM

Item	Details / Comments
Employee Name	
Training Topic	
Reason for Refresher	
Incident / Observation Reference	
Trainer	
Date Completed	
Verification Method	
Additional Follow-Up	

FORM F - JOB TASK QUALIFICATION CHECKLIST

Item	Yes	No	Comments
Procedure understood	<input type="checkbox"/>	<input type="checkbox"/>	
Hazard recognition adequate	<input type="checkbox"/>	<input type="checkbox"/>	
PPE requirements understood	<input type="checkbox"/>	<input type="checkbox"/>	
Emergency response understood	<input type="checkbox"/>	<input type="checkbox"/>	
Operational competency demonstrated	<input type="checkbox"/>	<input type="checkbox"/>	
Communication acceptable	<input type="checkbox"/>	<input type="checkbox"/>	
Supervisor authorization completed	<input type="checkbox"/>	<input type="checkbox"/>	

FORM G - CORRECTIVE ACTION TRACKING FORM

Item	Details / Comments
Action ID	
Source	
Competency Gap / Concern	
Corrective Action	
Owner	
Due Date	
Completion Date	
Verified By	
Status	

FORM H - EMPLOYEE DEVELOPMENT REVIEW FORM

Item	Details / Comments
Employee Name	
Development Need	
Coaching / Mentoring Assigned	
Training Required	
Field Evaluation Required	
Review Date	
Supervisor Notes	
Employee Feedback	

FORM I - COMPETENCY AUDIT AND OBSERVATION FORM

Item	Yes	No	Comments
Qualification records current	<input type="checkbox"/>	<input type="checkbox"/>	
Evaluations complete	<input type="checkbox"/>	<input type="checkbox"/>	
Refresher training tracked	<input type="checkbox"/>	<input type="checkbox"/>	
Corrective actions closed	<input type="checkbox"/>	<input type="checkbox"/>	
Employee feedback reviewed	<input type="checkbox"/>	<input type="checkbox"/>	
Supervisor review completed	<input type="checkbox"/>	<input type="checkbox"/>	
Documentation quality acceptable	<input type="checkbox"/>	<input type="checkbox"/>	

FORM J - WORK RESTRICTION / QUALIFICATION LIMITATION FORM

Item	Details / Comments
Employee Name	
Task / Qualification Limitation	
Reason for Limitation	
Temporary Controls	
Supervisor Review	
Employee Acknowledgment	
Follow-Up Date	
Release / Clearance Requirements	

FORM K - COMPETENCY PROGRAM REVIEW SUMMARY

Item	Details / Comments
Review Period	
Reviewer(s)	
Departments Included	
Top Competency Gaps	
Training Needs Identified	
System Barriers Identified	
Program Improvements Needed	
Management Review Notes	

FORM L - COMPETENCY TRAINING ACKNOWLEDGMENT

Item	Details / Comments
Employee Name	
Training Topic	
Program Expectations Reviewed	
Stop Work Authority Reviewed	
Qualification Limitations Reviewed	
Employee Signature	
Trainer / Supervisor	
Date	

APPENDIX A - OSHA AND COMPETENCY REFERENCE SUMMARY

This program is intended to support competency verification expectations, qualification management practices, employee development principles, training verification expectations, and operational readiness requirements. Competency principles recognize that error is often influenced by work conditions, systems, communication, training quality, supervision, and operational pressures. Competency evaluations should therefore look beyond individual performance and evaluate whether the system provided employees with the knowledge, tools, time, and supervision needed to perform safely.

APPENDIX B - TRAINING MANAGEMENT EXPECTATIONS

- Verify qualification before independent work assignment.
- Document training and competency evaluations clearly.
- Use refresher training when procedures change or gaps are identified.
- Evaluate practical performance, not just classroom attendance.
- Assign follow-up only when there is a clear action, owner, and due date.

APPENDIX C - SUPERVISOR VERIFICATION EXPECTATIONS

Supervisor verification activities should include employee observation, practical evaluation, communication review, qualification confirmation, work restriction evaluation, and documented supervision expectations. Verification conversations should remain professional, respectful, development-focused, and supportive of employee involvement. Supervisors should avoid assumptions, public embarrassment, threats, or statements that discourage employees from asking questions or reporting competency concerns.