ESTVOLD OILFIELD SERVICES

RIGGING AND MATERIAL HANDLING POLICY

Document Number: EST-HSE-506
Title: Rigging and Material Handling Policy
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Policy Control Item	Policy Information
Company	Estvold Oilfield Services
Document Type	Policy / Field Forms / Rigging and Material Handling Audit Package
Applies To	All lifting operations, rigging activities, material handling operations, customer sites, shops, yards, and field operations
Program Intent	Rigging safety, load control, lifting hazard prevention, communication coordination, line-of-fire prevention, and continuous improvement
Regulatory Alignment	OSHA rigging and lifting safety expectations, material handling principles, load securement and line-of-fire prevention requirements
Revision	Comprehensive V2 - Editable Master
Approval	Management / HSE / Operations

INCLUDED IN THIS PACKAGE

- Policy manual
- Supervisor quick response guide
- Rigging hazard assessment form
- Rigging inspection checklist
- Lift planning and load verification form
- Rigging equipment removal form
- Line-of-fire exposure checklist
- Lift communication and signal verification form
- Supervisor audit and observation form
- Corrective action tracking form
- Rigging incident review form
- Rigging and material handling training acknowledgment

DOCUMENT CONTROL

Revision	Date	Description of Change	Approved By
0	Initial Release	Original controlled document issue	Management
1	Current Draft	Expanded rigging and material handling manual and forms package	Management
2	Current Revision	BBS master format clone with full management-system depth, expanded operational guidance, tables, forms, audit tools, and leadership review structure	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, lifting coordinators, training coordinators, company shared safety systems, and client-required safety documentation platforms. Document users are responsible for confirming they are working from the current revision before applying program requirements.

IMPLEMENTATION NOTE

This manual is written to function as both a management standard and a supervisor reference. The forms at the end are intentionally detailed enough for field use, lift planning review, rigging equipment verification, load control confirmation, line-of-fire exposure review, corrective action tracking, and audit support.

HOW TO USE THIS MANUAL

- Use Sections 1 through 24 as the governing rigging and material handling program standard.
- Use the matrices and supervisor guide during lift planning, field verification, and response to changing lifting conditions.
- Use the forms package for lift planning, rigging inspection, communication verification, equipment removal, line-of-fire control, corrective action tracking, and management review.
- Review program data periodically for recurring rigging defects, line-of-fire findings, communication failures, lift planning gaps, and training needs.
- Escalate critical lifts, unstable loads, failed rigging inspections, dropped object events, or repeated deficiencies to management and HSE immediately.

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CONTENTS

1. PURPOSE AND POLICY STATEMENT

Estvold Oilfield Services is committed to protecting employees, contractors, visitors, client representatives, and the public from hazards associated with rigging operations and material handling activities during company operations. Rigging and lifting hazards may include dropped loads, line-of-fire exposure, equipment failure, struck-by hazards, pinch points, unstable loads, environmental exposure, and communication failures. This program establishes a comprehensive framework for lift planning, rigging inspection, load control, communication, material handling coordination, and continuous improvement. No production expectation, operational pressure, or client demand shall take priority over employee health and safety.

2. SCOPE AND APPLICATION

This program applies to all Estvold Oilfield Services employees, temporary workers under company supervision, supervisors, management personnel, contractors, and company-controlled worksites involving rigging or material handling activities. The process applies to lifting operations, hoisting activities, rigging activities, load securement, crane support activities, material staging, mechanical material handling, manual material handling, shop operations, yards, customer sites, and field operations.

3. REGULATORY ALIGNMENT AND REFERENCES

This program is written to align with OSHA rigging and lifting safety expectations, material handling principles, load securement requirements, line-of-fire prevention practices, applicable client standards, and company safety management expectations. Where client requirements or site-specific procedures are more restrictive, the more protective requirement shall be followed.

4. DEFINITIONS

Rigging means the equipment, devices, hardware, and methods used to attach, support, secure, or move loads during lifting operations. Line-of-fire exposure means any position placing personnel in the path of moving, shifting, suspended, pressurized, falling, swinging, or uncontrolled loads. A signal person is an individual designated to communicate lifting instructions or movement coordination between personnel and equipment operators.

5. RIGGING AND MATERIAL HANDLING HAZARD RECOGNITION

Potential rigging hazards may include unstable loads, improper rigging selection, equipment failure, damaged slings, line-of-fire exposure, dropped objects, pinch points, struck-by exposure, environmental conditions, poor communication, and suspended load exposure. Employees shall recognize that lifting hazards may change rapidly during operations as load balance, wind, equipment position, ground conditions, and personnel movement change.

6. PROGRAM PHILOSOPHY AND CORE PRINCIPLES

The Rigging and Material Handling Program is based on the principle that lifting and load movement risks must be controlled before the load is moved. Lift planning, communication, load verification, inspection, and line-of-fire control are expected to be built into the job, not added after work begins. Employees are expected to stop work whenever a load is unstable, rigging condition is uncertain, communication is unclear, or personnel are exposed to the load path.

7. ROLES AND RESPONSIBILITIES

Employees are responsible for recognizing lifting hazards, inspecting rigging equipment before use, following communication expectations, remaining clear of suspended loads, reporting unsafe conditions, and stopping unsafe work. Supervisors are responsible for ensuring lift planning is completed, rigging inspections are performed, communication methods are established, personnel are positioned safely, and unsafe conditions are corrected. Management is responsible for providing resources, training, equipment, and accountability necessary to support safe lifting operations.

8. LIFT PLANNING AND HAZARD ASSESSMENT REQUIREMENTS

Lift planning activities shall address load weight, center of gravity, rigging configuration, rated capacity, equipment limitations, environmental conditions, travel path, swing radius, ground condition, line-of-fire exposure, communication methods, and emergency response access. Non-routine, complex, or higher-risk lifts shall receive additional review before work begins.

Planning Element	Required Review
Load information	Weight, center of gravity, shape, attachment points, and stability
Rigging method	Sling type, hardware, angle, capacity, tag lines, and connection points
Work area	Ground conditions, travel path, overhead hazards, pedestrian exposure, and access
Communication	Signal person, radio or hand signals, stop signal, and lift sequence
Emergency readiness	Emergency access, response contacts, and equipment isolation needs

9. RIGGING EQUIPMENT INSPECTION AND VERIFICATION EXPECTATIONS

Slings, shackles, hooks, chains, wire rope, lifting devices, spreader bars, clamps, and rigging hardware shall be inspected before use for wear, damage, deformation, missing identification, illegible tags, cuts, kinks, corrosion, heat damage, and operational deficiencies. Defective rigging equipment shall be removed from service immediately and shall not be returned to use until evaluated and approved according to company expectations.

Deficiency	Required Action
Missing or illegible tag	Remove from service until identification and rating are verified
Cuts, kinks, deformation, or broken wires	Remove from service immediately
Damaged hooks, shackles, or hardware	Remove from service and replace or inspect by qualified personnel
Uncertain capacity or application	Stop work and verify before use

10. LOAD CONTROL AND SECUREMENT REQUIREMENTS

Loads shall be controlled, balanced, secured, and lifted according to rated capacities, manufacturer requirements, and approved rigging methods. Loads shall not be lifted when the weight is unknown, the rigging method is uncertain, the load is unstable, the attachment points are inadequate, or the path of travel cannot be controlled safely.

11. LINE-OF-FIRE AND SUSPENDED LOAD PROTECTION

Employees shall remain clear of suspended loads, pinch points, swing radius exposure, falling object zones, and uncontrolled movement hazards during lifting operations. Personnel shall not stand under suspended loads or place themselves between loads and fixed objects. Exclusion zones, barricades, tag lines, spotters, and controlled access methods shall be used when needed to prevent exposure.

12. COMMUNICATION AND SIGNAL PERSON EXPECTATIONS

Communication methods and signal responsibilities shall be established before lifting activities begin. Signal persons shall maintain visibility and communication with equipment operators during lifting operations and shall remain positioned outside the line of fire. If communication is lost, unclear, or conflicting, the lift shall stop until communication is restored and expectations are confirmed.

13. MATERIAL STORAGE AND HANDLING CONTROLS

Materials shall be stored and handled to minimize instability, rolling hazards, falling object exposure, pinch points, access concerns, and unnecessary manual handling. Material staging shall consider ground conditions, load stability, equipment access, pedestrian exposure, environmental conditions, and emergency access.

14. WORKSITE HAZARD ASSESSMENT AND PRE-TASK PLANNING

Before work begins, supervisors and employees shall evaluate lifting exposure, environmental conditions, overhead hazards, underground or utility concerns, travel routes, load stability, equipment positioning, pedestrian exposure, weather, lighting, and emergency response access. Pre-task planning shall include the personnel involved in the lift and shall confirm that controls are understood.

15. ENVIRONMENTAL AND WEATHER CONSIDERATIONS

Weather conditions including wind, rain, snow, ice, lightning, poor visibility, unstable ground, heat, cold, and environmental exposure shall be evaluated during lifting activities. Lift activities shall be delayed, modified, or stopped when environmental conditions affect load control, communication, equipment stability, or personnel safety.

16. CRITICAL LIFT AND NON-ROUTINE LIFT CONSIDERATIONS

Critical or non-routine lifting activities may require enhanced planning, documented lift plans, additional supervision, engineered review, customer coordination, or management approval. Factors requiring escalation may include heavy or awkward loads, personnel exposure, limited clearance, poor visibility, tandem lifts, high-value equipment, energized or process equipment proximity, or severe environmental conditions.

17. CONTRACTOR AND THIRD-PARTY EXPECTATIONS

Contractors working on company-controlled sites are expected to comply with rigging safety expectations, load securement requirements, communication controls, inspection expectations, and lifting procedures. Contractor lift plans, rigging inspections, qualifications, and communication methods shall be coordinated with Estvold supervision when work may affect company personnel or operations.

18. DOCUMENTATION AND RECORDKEEPING

The company shall maintain lift planning documentation, rigging inspections, equipment removal records, corrective action records, audit documentation, incident review records, and training records. Documentation shall be accurate, legible, complete, and retained according to company requirements.

19. INCIDENT REPORTING AND INVESTIGATION

Rigging incidents, dropped loads, line-of-fire exposure, communication failures, equipment failures, near misses, damaged rigging, or unsafe lifting conditions shall be reported immediately. Incident reviews shall identify contributing factors, environmental conditions, communication issues, work planning concerns, equipment condition, training gaps, and corrective actions.

20. STOP WORK AUTHORITY

All employees and contractors have the authority and responsibility to stop work when lifting hazards exist, loads are unstable, communication fails, rigging equipment is defective, personnel are exposed to the load path, or serious injury exposure exists. Stop Work Authority shall be supported by supervision and management without retaliation.

21. TRAINING REQUIREMENTS

Training may include rigging hazard recognition, sling and hardware inspection, load securement expectations, communication and signal methods, line-of-fire awareness, environmental condition evaluation, dropped object prevention, material handling controls, and stop work authority. Employees shall not perform rigging tasks beyond their training, qualification, or authorization.

22. TREND ANALYSIS, KPIs, AND DATA REVIEW

Rigging inspections, lift planning records, corrective actions, incident reports, near misses, audit findings, employee feedback, and supervisor observations shall be reviewed periodically to identify recurring trends and improvement opportunities. Trend review shall focus on prevention, learning, and system improvement rather than blame.

KPI / Metric	Purpose	Review Frequency
Rigging Inspection Completion	Confirms equipment is reviewed before use	Task-based / monthly
Defective Rigging Removed from Service	Tracks equipment condition and replacement needs	Monthly
Lift Planning Quality	Evaluates completeness of hazard assessment and load control planning	Audit cycle
Line-of-Fire Findings	Identifies repeated personnel positioning concerns	Monthly
Communication-Related Findings	Tracks signal, radio, or coordination breakdowns	Monthly
Corrective Action Closure	Verifies assigned improvements are completed	Monthly

23. LEADERSHIP ACCOUNTABILITY

Leadership personnel shall demonstrate ownership of rigging and material handling performance through visible field engagement, resource support, timely corrective action closure, and review of lifting-related trends. Employees judge the strength of the program by whether leaders support safe decisions when lift planning slows work or requires additional controls.

Leadership Expectation	Evidence of Completion
Support safe lift planning	Work is delayed, modified, or stopped when the lift is not controlled
Remove barriers	Proper rigging equipment, inspection tools, and qualified support are available
Review recurring findings	Lift planning gaps, defective rigging, and line-of-fire findings are reviewed
Verify field execution	Supervisor or manager observations documented
Reinforce accountability	Repeat deficiencies corrected through coaching, training, or escalation

24. AUDITING AND CONTINUOUS IMPROVEMENT

The company shall periodically review rigging inspections, lift planning quality, load control practices, communication effectiveness, line-of-fire prevention, corrective action completion, incident trends, documentation quality, employee feedback, and program consistency. Audit findings shall be tracked to completion and used to strengthen planning, equipment reliability, and field execution.

Audit Focus Area	Minimum Evidence Expected
Rigging equipment condition	Inspections complete and defective equipment removed from service
Lift planning	Load weight, rigging method, communication, and line-of-fire controls documented
Communication controls	Signal method and stop work expectations verified
Line-of-fire prevention	Personnel positioning, exclusion zones, and suspended load controls effective
Training and employee knowledge	Employees understand inspection, load control, communication, and stop work expectations

25. SUPERVISOR QUICK RESPONSE GUIDE

Situation	Immediate Action	Key Documentation / Control
Rigging defect identified	Remove from service immediately	Rigging inspection checklist
Line-of-fire exposure identified	Reposition personnel and reassess controls	Line-of-fire exposure checklist
Communication failure identified	Suspend lifting activities until corrected	Signal verification form
Unstable load identified	Stop lift and reassess lift plan	Lift planning and load verification form
Environmental conditions change	Pause lift and review conditions	Worksite hazard assessment
Rigging incident occurs	Initiate emergency response, reporting, and review	Rigging incident review form

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26. FORMS PACKAGE

The following forms are provided as editable field tools. They may be converted to electronic forms, fillable PDF, shared drive logs, or safety management software entries as needed. Supervisors shall complete applicable forms when rigging, lifting, load movement, material handling, line-of-fire exposure, or lift communication controls are required.

FORM A - RIGGING HAZARD ASSESSMENT FORM

Field	Entry
Date	
Jobsite / Location	
Supervisor	
Lift Description	
Load Weight Verified	
Rigging Equipment Verified	
Environmental Concerns	
Communication Established	
Line-of-Fire Controls Required	
Additional Controls Required	
Employee Review Completed	
Supervisor Signature / Date	

FORM B - RIGGING INSPECTION CHECKLIST

Item	Yes	No	N/A	Comments
Slings inspected	☐	☐	☐	
Shackles acceptable	☐	☐	☐	
Hooks operational	☐	☐	☐	
No visible damage	☐	☐	☐	
Rigging tags legible	☐	☐	☐	
Hardware rated for load	☐	☐	☐	
Rigging configuration reviewed	☐	☐	☐	
Defective equipment removed from service	☐	☐	☐	

FORM C - LIFT PLANNING AND LOAD VERIFICATION FORM

Field	Entry
Load Description	
Estimated / Verified Weight	
Center of Gravity Reviewed	
Rigging Method Selected	
Rated Capacity Verified	
Travel Path Reviewed	
Signal Person Assigned	
Critical Lift Review Required	
Supervisor Approval	

FORM D - RIGGING EQUIPMENT REMOVAL FORM

Field	Entry
Date	
Equipment Type / ID	
Defect Identified	
Removed By	
Location Removed From	
Replacement Required	
Disposition / Repair	

Field	Entry
Supervisor Verification	

FORM E - LINE-OF-FIRE EXPOSURE CHECKLIST

Item	Yes	No	N/A	Comments
Personnel positioned safely	☐	☐	☐	
Suspended load area controlled	☐	☐	☐	
Blind spots controlled	☐	☐	☐	
Swing radius reviewed	☐	☐	☐	
Pinch points identified	☐	☐	☐	
Barricades / exclusion zones installed	☐	☐	☐	
Tag line use reviewed	☐	☐	☐	
Personnel clear before movement	☐	☐	☐	

FORM F - LIFT COMMUNICATION AND SIGNAL VERIFICATION FORM

Item	Yes	No	N/A	Comments
Signal person assigned	☐	☐	☐	
Communication method verified	☐	☐	☐	
Operator visibility acceptable	☐	☐	☐	
Travel path clear	☐	☐	☐	
Stop signal reviewed	☐	☐	☐	
Radio channel confirmed if used	☐	☐	☐	
Personnel clear of suspended load	☐	☐	☐	
Communication maintained throughout lift	☐	☐	☐	

FORM G - SUPERVISOR AUDIT AND OBSERVATION FORM

Item	Yes	No	N/A	Comments
Lift planning completed	☐	☐	☐	
Rigging inspected before use	☐	☐	☐	
Load weight / stability verified	☐	☐	☐	
Line-of-fire controls effective	☐	☐	☐	
Signal method understood	☐	☐	☐	
Personnel clear of suspended load	☐	☐	☐	
Environmental conditions reviewed	☐	☐	☐	
Corrective actions assigned where needed	☐	☐	☐	

FORM H - CORRECTIVE ACTION TRACKING FORM

Action ID	Issue Identified	Responsible Person	Due Date	Completion Date	Effectiveness Verified

FORM I - RIGGING INCIDENT REVIEW FORM

Field	Entry
Date / Time	
Location	
Personnel Involved	
Incident / Near Miss Description	
Load / Rigging Involved	
Immediate Actions Taken	
Root / Contributing Factors	
Corrective Actions Required	

Field	Entry
Management Review Completed	

FORM J - RIGGING AND MATERIAL HANDLING TRAINING ACKNOWLEDGMENT

Employee Name	Training Date	Topics Reviewed	Employee Signature	Trainer / Supervisor
		Rigging inspection, lift planning, load securement, line-of-fire control, communication, material handling, stop work authority		

APPENDIX A - RIGGING SAFETY REFERENCE SUMMARY

This program is intended to support rigging safety expectations, load securement practices, line-of-fire prevention principles, lifting operation management, equipment inspection, communication control, and continuous improvement. Rigging and material handling work shall be planned, verified, communicated, and controlled before load movement begins.

APPENDIX B - RIGGING INSPECTION EXPECTATIONS

- Inspect slings, hooks, shackles, chains, wire rope, clamps, and lifting devices before use.
- Verify capacity markings, tags, condition, configuration, and compatibility with the load.
- Remove damaged, questionable, or unidentified rigging from service immediately.
- Do not use rigging equipment beyond the manufacturer rating or intended application.
- Document repeated equipment deficiencies and evaluate replacement or procurement needs.

APPENDIX C - LINE-OF-FIRE CONTROL EXPECTATIONS

- Keep personnel clear of suspended loads, pinch points, swing radius areas, and uncontrolled load paths.
- Use exclusion zones, barricades, spotters, tag lines, and controlled access methods where needed.
- Stop lifting activities when personnel positioning cannot be controlled.
- Confirm communication methods and stop signals before the lift begins.
- Reassess line-of-fire controls whenever the load path, equipment position, or work conditions change.