



BC Association for
CRANE SAFETY

Crane Operator Assessment for Licensing and Qualification Challenge

INDUSTRY CONSULTATION REPORT

Mobile, Boom and Tower Crane Task Groups
Joint meeting

“Assessment of Crane Operators: A Plan”

BC Association for Crane Safety Meeting Room,
New Westminster, BC
November 27th, 2007

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JOINT CRANE ASSESSMENT CONSULTATION

New Westminster, BC

November 27th 2007

In Attendance (in order of seating):

Kathy Sheppard — Tower / chair - WorkSafeBC

Roy Popma – Boom – Eagle West Crane Ltd.

Ron Karras – Tower – Micron Construction

Wayne Fettback – Boom – Western Pacific Enterprises

Gordon Edgelow – Mobile – Griffiths / North American
Construction Group

Bob MacMillan – Mobile - GWIL Crane Service

Russel Robertson – ITA

Garry Bancarz – Boom – Convoy Supply Ltd.

Rob Magee – Mobile – GWIL Industries Ltd. / Chair BCACS

Val Coupal – Tower – Coupal Climbing Crane Ltd.

Gordon Lindberg – Multi – GWIL / OETP

Ryan Burton – tower – Eagle West Tower Cranes Ltd.

Ernie Fabbian – Multi – PCL Constructors Ltd.

Fraser Cocks – BCACS Executive Director

Michael Pelletier – Multi - Emil Anderson Group

Kerry Hawley – Multi – Mega Cranes Ltd.

Lee Middleton – Consultant – Fulford Harbour Group Ltd.

Chris Henry – Boom – Phoenix Truck and Crane Ltd.

Russ Dowdeswell – Multi – Log Home Builders Association

Ken Morrisson – Boom – BC Hydro

Howard Muir – Mobile – Cariboo Pulp and Paper

Bill Meechan – Multi - Seaspan

Background

This consultation workshop was the 13th in a series of task group workshops for crane industry stakeholders. These stakeholders have developed a competency based, licensing and certification framework for mobile, boom and tower crane operators in BC. The BC Association for Crane Safety (BCACS) is facilitating this process and providing the administrative support needed for industry to lead this change. The competency based certification framework is used by WorkSafeBC as the foundation for the crane safety regulation proclaimed in January 2007.

With the finalisation in September of the Boom, Mobile and Tower programs the standards against which all crane operators are to be assessed are fixed. Assessment of operators is scheduled to begin on a pilot basis in January 2008. The Industry Training Authority has approached the BCACS board with a plan for assessment of incumbent operators and new trainees. The BCACS board desired industry as a whole to be consulted on this plan and convened this workshop for that purpose, as well as final adoption of the edited program standards / training materials.

Workshop Goals

1. Endorse the final standards from the mobile, boom and tower programs with the adjustments requested at Task Group Workshop 12 “Validation of Training Materials” in September 2007.
2. Address industry identified issues with the OHS 14.3 regulation’s guideline wording.

3. Communicate to industry the proposal by the Industry Training Authority for Assessment of Crane Operators, both incumbents and trainees, and:
 - a. Receive feedback on the plan and adjustments to the plan suggested by industry.
 - b. Endorse the overall plan and proposed approach to assessment.
 - c. Recommend Standards which the ITA will use to hire a Lead Assessor (assessor manager / administrator)
 - d. Review hiring standards for assessors from previous task group work as they relate to the ITA's current on job assessor standards.

4. Inform industry of next steps in terms of piloting the assessment tools and the likely roll out industry wide / province wide of incumbent assessment.

Endorsement of Program Standards

Decision required:

Program Standards have been finalised following industry input and require final validation by industry. Once validated these will become the official standards which candidates must meet to receive a BC Certificate of Qualification. It should be noted that the BCACS is able to recommend adjustments to these standards as industry consensus requires in the future. Therefore the final validation is not a requirement to set the standards in stone, but rather is required so that the Industry Training Authority can register the standards on the Provincial Qualification framework as the standards currently recognised by industry.

The standards are grouped into the following qualifications with validation / change requirements noted:

Mobile:

- 80 tonnes and under Hydraulic - Validated

- Unlimited tonnage hydraulic - Validated
- Lattice Friction - Validated
- Lattice Hydraulic - Validated

Boom:

- 22 tonnes and under folding boom – Remove Transportation Competency then Validated
- Unlimited tonnage folding boom - Validated
- 40 tonnes and under stiff boom – Remove Transportation Competency then Validated
- Unlimited tonnage stiff boom - Validated

Tower:

- Tower Crane Operator – tower crane group to meet with contractor December 6th to run through industry recommended adjustments to the material.

There is currently no qualification for self – erect crane operator. This is in development, and will be reviewed by industry in draft form at the end of December 2007. See note under Tower Crane decision below.

Decision:

Mobile:

- Program content validated by industry.

Boom:

- Following noted adjustment standards validated by industry.

Tower:

- Program content validated by industry.

- A process begun to determine the training standards for Self-erect crane operators which will see industry define the standards for training self erect operators and determine linkages to other programs.

Action:

Mobile:

- Recommend the BCACS Board formally accept the 4 Mobile Crane Programs standards and request the ITA formally register and accredit (where applicable) the programs.

Boom:

- Recommend the BCACS Board formally accept the 4 Boom Truck Programs standards and request the ITA formally register the programs.

Tower:

- Recommend the BCAS Board formally accept the Tower Crane Program standards and request the ITA formally register the program once adjustments required by the Tower Task group are made.

Comment:

Acceptance of these standards and the answers to the questions posed by the ITA in the next sections concluded development of the Program Standards review / Training Program Update.

The contracts with the ITA conclude at this point and all required materials have been completed in final form (once changes are made to the Tower Crane program).

Change requests from Industry on the Crane Regulation Guideline

Issue: Crane tonnage wording not as requested.

Industry requests all measures in the Crane Regulation be metric.

Decision:

Kathy Sheppard agrees that the regulation and guideline need to list both metric and imperial measures.

Action:

Kathy Sheppard will take industry's request to WorkSafe for inclusion in the Regulation.

Issues: Minimum cut off on crane capacity for the regulation to apply is listed as *'Five tonnes and greater'*.

This is confusing as it will likely lead to crane manufacturer's rerating five tonne cranes to 4.9 tonnes. A precedent is Transport Canada regulations requiring vessels with motors 10hp and greater to be licensed. The result was the immediate and widespread rerating of 10hp motors to 9.9hp.

Decision: Adjust regulation wording such that cranes *'Greater than Five tonnes capacity'* are subject to the regulation

Kathy Sheppard from WorkSafe BC agreed this request made sense from the perspective of regulatory clarity.

Action:

Kathy Sheppard will take industry's request to WorkSafe for inclusion in the Regulation.

Issues: Some confusion exists over the meaning of ‘supervision’ in the regulation as it pertains to Level 2 operators.

This is confusing as it is unclear to industry what level of supervision is required for Level 2 operators as well as under what working conditions Level 2 Operators are able to legally work. The example was raised “Do private contractors using Stiff Boom Trucks on another company’s private industrial property need to be Level 3 operators? If they can be Level 2 operators what degree of supervision is required in the above scenario?”

Decision: Industry requests clarification of the wording contained in the draft crane regulation as it pertains to Level 2 operators and the regulated conditions of their operating.

Action:

Fraser Cocks, BCACS will work with WorkSafe to clarify this issue and report back to industry by e-mail on the results of the clarification.

ITA Assessment Proposal and Plan

Summary:

The ITA has developed a plan in partnership with the BCACS to deliver assessment services and award credentials for all incumbent operators and new trainees in the Province. The plan is under development and will be ready for piloting in the first Quarter of 2008 with full roll out to take place by mid 2008.

Key Features:

The assessment plan developed and proposed by the ITA has these key features which build on industry input provided over the past two year’s Task Group meetings. Key features and steps are:

1. Practical assessment required to receive BC Certificate of Qualification.
2. Certificate of Qualification is required to obtain the Crane License (which may have a photo ID system administered by the BC Association for Crane Safety – this is to be determined).
3. Final practical assessment the same for incumbents as well as new trainees.
4. Incumbents ‘challenge’ the Qualification by filling out a Challenge application.
5. Once the challenge application is approved a practical assessment is booked.
6. If the challenge application is not successful the applicant is informed of the gaps he or she must fill either through providing further documentation of experience or through participation in some form of upgrade training.
7. Assessors contracted by the ITA perform the assessments.
8. ITA will train the assessors using material modified from other training programs which require practical assessment.
9. A Lead Assessor contracted by the ITA oversees the assessment system and ensures transparency, consistency and fairness of the practical assessments.
10. Assessment results are reported to the BCACS or its designated agent for issuance of licenses.
11. Those found not yet competent are given guidance on what areas they need to brush up on and permitted to make an appointment for reassessment following submission of the appropriate application.
12. Multiple re-assessments will be reviewed on a case by case basis to avoid punishing those with extenuating circumstances as may occur in some cases when a policy is applied that prohibits multiple re-assessments.
13. Operators who are competent, and have received the Certificate of Qualification, may be issued a separate license card to more easily carry

in their wallet for use on the work site. This detail will be worked out during piloting of the assessment system.

Appendix 1 contains a flow chart produced by the ITA which depicts the assessment process in detail. Below is a more detailed overview of some of the key points and the development work each requires.

More Detail: Assessors

The Assessor will be contracted, most likely in a full time capacity at first and part time in one to two years' time, by the ITA. The ITA will have hiring authority as the assessor's performance will be contractually defined between the ITA and the Assessor. The ITA has expressed interest in the crane industry defining the standards which assessors must work to. These must complement the work the ITA has already done in the area of workplace assessment, which includes a Workplace Assessor Qualification developed for other occupations. However, the Crane Assessor positions are the first full time professional assessors (3rd party) that the ITA has developed. The full time assessment role differs from the workplace assessor role, which is concerned with mentoring trainees (in the nine crane qualifications the workplace assessor is called the mentor). Therefore the 3rd party assessment role will need to be developed beyond the work already completed for Workplace Assessors. Thus the industry discussed what they would like to see define the role of the 3rd party assessor to complement the existing work of the ITA.

Industry had previously described the interpersonal requirements of 3rd Party Assessors at a previous task group session. These were as follows:

Assessor Interpersonal Qualities

- Strong communicator able to get across requirements for assessment and give feedback in a clear and simple way.
- Service oriented individual – recognises that Industry is the client of the assessment system and as with any good client relationship; principles of good service must be applied.
- Coordinates and schedules own workload independently.
- Comfortable with the authority position of the assessor role – will not react to challenge negatively. Comfortable with explaining the role and the reason for the role when required.

Further to this industry recommends the assessor meet these criteria:

Assessor Selection Criteria

- They possess the Assessment Qualification – either a new 3rd party assessment qualification or the workplace assessor qualification under development.
- They are competent, having been assessed as competent using the same tools they will in turn use assessors. For maximum flexibility industry would like to see at least some assessors competent on multiple crane types.
- They have industry involvement. This as a guideline means a minimum five year's attachment to the industry, and in practice likely much longer to ensure the assessor has the range of experience required to be a competent assessor as well as the respect of industry through a record of workplace contribution to the success of the industry. After much discussion it was decided that the 'competence' of the assessor need not be tied to a specific number of years, provided the strength of industry involvement was considered in selection.

- For Mobile Crane assessors the assessor must possess a Ticket of Qualification with a Red Seal endorsement.

More detail: Lead Assessor selection

A key role in the assessment system is the Lead Assessor. This person will be contracted full time by the ITA to administer and oversee the quality of the assessment system. The Lead Assessor will play a central role in selecting and training assessors. As the bulk of the incumbent operators in BC are assessed it is likely that the role of Lead Assessor would become a part time contract.

The ITA, while clear that they will hire the Lead Assessor on a contract basis, have asked industry to guide the selection of the individual for this position as it is such an important role, key to the credibility of the assessment system as it roles out.

Industry has created a high level list of selection criteria to use in recommending a Lead Assessor to the ITA. This list is:

Lead Assessor Selection Criteria

- The Lead Assessor must be respected across the industry through a long career of contribution to the crane industry in Canada.
- Must have demonstrated competence in teaching operators as well as in assessing operators for Provincial level certification.
- The Lead Assessor must possess a crane related Ticket of Qualification with a Red Seal endorsement.
- The Lead Assessor must closely fit the job profile of 'ITA Crane Assessments Lead Assessor (to be developed)' which requires the Lead Assessor to play a key role in managing and developing:
 - The quality control process for the assessments / assessors

- The audit mechanism to ensure assessment is to a consistently high standard
- The competence of the assessors through ongoing mentoring and professional development assistance.
- The Lead Assessor must be competent in all three disciplines of crane operation which will be assessed, ideally with competence in operating / supervising Self Erect cranes.

Industry forwarded the decision to recommend a Lead Assessor candidate shortlist to an Assessment Committee comprised of five task group volunteers. See the action item below.

Decision: Industry enthusiastically endorses the ITA assessment approach and desires to play an advisory role in the assessment system.

Industry felt the ITA had done considerable work to develop the assessment system. Industry endorsed, with appreciation, the plan as currently defined.

Action: Assessment Committee (Lead Assessor Selection Committee)

Having defined the Assessor Selection Criteria in the material above to this point the industry recognizes that the ITA as contracting agent of the assessors will further define the Assessor Selection Criteria. Through later discussion of the Lead Assessor role industry agreed to establish an Assessment / Moderation Committee. Industry would like this committee to review and monitor, on behalf the task groups, the final assessor selection criteria as well as the final 3rd party assessor qualification and associated training program. Input will be given to the ITA by this committee as required.

Additionally the Assessment Committee will select a shortlist of candidates for the Lead Assessor position from approximately 30 assessor applications which have been received by the Executive Director.

Assessment Committee

The Assessment Committee is made up of the following five volunteers from the Task Group, selected and approved at the Task Group meeting by the membership as a whole:

1. Rob Magee – President BCACS Board (Mobile)
2. Ryan Burton – Tower Cranes
3. Ron Karras – Tower Cranes
4. Wayne Fettback – Boom Trucks
5. Gord Lindberg – Training Provider (Mobile and Boom)
6. Kerry Hawley – Mobile and Boom

The Assessment Committee members agreed to meet before Christmas 2007 in order to select and forward a shortlist of Lead Assessor candidates to the ITA in time for a Lead Assessor to be contracted prior to the Assessment Pilot (scheduled to begin February 1st – see next section).

Next Steps in Piloting the Assessment Plan and beyond

Summary:

All industry stakeholders are eagerly awaiting the roll out of the Crane Assessments. In order to make sure the assessment tools are ready for the task of assessing thousands of operators, these and the structure to support their use will be piloted in a 3 month project co – funded by the ITA and WorkSafe BC. The Pilot Project will commence mid – January 2008 and run through to the end of March 2008.

Pilot Project in detail:

WorkSafe, the ITA and BCACS are eager to realistically pilot test all aspects of the crane assessment process during the pilot phase. The Pilot Test will have the following goals:

- **Test the Assessments:** Current operators will be assessed on a volunteer basis to determine how smoothly the assessment tools which have been developed work. The assessment tools will be modified as required at the end of the pilot.
- **Test the booking and payment systems:** Operators assessed will be assessed a subsidised fee of \$200 for their assessment. The means of booking the assessment and collection of payment will be tested and adjusted before the full load of demand is placed upon these systems.
- **Develop the 'Assessment policies and procedures':** These will govern such things as the quality control mechanism that ensures assessments are consistently to a high standard, the audit mechanism for the assessors to ensure the quality control system is functioning, the paper flow required to produce an efficient legal record of the assessment and all related details.
- **Land on the cost of the assessment:** During the pilot the cost of delivering the assessment will be determined. Though the industry requires the assessment to cost the same in Terrace as it does in Burnaby, it will be necessary to deliver the pilot throughout the Province in order to determine what overall costs the assessment fees must cover. A price for the full roll out will be known in April 2008. Until then, as mentioned above, the cost of the assessment will be \$200 during the trial.

The pilot test in essence is a 'soft start' to the launch of crane assessment by the ITA in BC. The full launch of the assessment system is planned for April 2008.

Details will be provided to industry throughout the pilot process with an industry task group scheduled for February 2008.

Appendix 1: ITA Crane Assessment System

Overleaf