



**Safety Assessment Federation  
Specification 01:2004**

---

**Health and Safety  
Passport Scheme**

**for**

**Engineer Surveyors**

---

**Issue 02**

**Dated 1<sup>st</sup> October 2008**

## FOREWORD

Safety Assessment Federation (SAFed) member companies provide safety engineering examination and assessment services covering an extensive range of mechanical and electrical plant, equipment and systems. In carrying out these specialist examination and assessment services, SAFed member company engineer surveyors may be called upon to visit a wide spectrum of sites ranging from a block of domestic flats to a construction site or a quarry.

In order to carry out their examination and assessment services safely, engineer surveyors require therefore to have appropriate health and safety knowledge and awareness covering all the domestic and industrial sites that they are likely to be called upon to visit. The SAFed Health and Safety Passport Scheme has been designed with the specific intention of meeting this requirement. In addition, unlike any other existing Health and Safety Passport scheme, the SAFed Scheme takes account of the unique and specialist activities that engineer surveyors undertake thus providing individuals with the appropriate health and safety knowledge and awareness required to ensure that their examination and/or assessment activities are undertaken safely.

After a review of the SAFed Health and Safety Passport Scheme by the HSE, their Head of Hazards and Technical Policy Division, Dr W Gillan BSc MBA MIEE CEng, provided the following communication to SAFed:

*“HSE views Health and Safety Passport schemes as being an important way of improving health and safety – they really can make a difference, we are therefore very pleased to welcome this SAFed Scheme which is tailored to the specialised needs of their member company engineer surveyors.*

*The provision of health and safety instruction, information and training helps to ensure that employees are not injured or made ill by their work. It helps to develop a positive health and safety culture – where safe and healthy working becomes second nature. It is not just about satisfying the legal requirements; getting this right can help to avoid the financial costs of accidents and ill health and improve productivity at work.*

*HSE is very aware of the benefits of Health and Safety Passport schemes. Whilst HSE cannot endorse individual products, as to do so would cut across our statutory duty to enforce the law, we do however applaud initiatives such as the SAFed Scheme which is designed to both improve and demonstrate appropriate health and safety awareness for SAFed member company engineer surveyors. It is not HSE’s role to secure agreement and mutual recognition between the many Schemes in operation – that can only come from the industries or organisations themselves. We do however encourage this to avoid needless duplication of effort.”*

## CONTENTS

	<b>Page</b>
<b>1. INTRODUCTION</b>	<b>4</b>
<b>2. SCOPE</b>	<b>4</b>
<b>3. DEFINITIONS</b>	<b>5</b>
<b>4. GENERAL FEATURES OF THE SPECIFICATION</b>	<b>5</b>
<b>4.1 Introduction</b>	<b>5</b>
<b>4.2 Recruitment and initial training</b>	<b>5</b>
<b>4.3 Applicability of Health and Safety Passport to industry sectors</b>	<b>5</b>
<b>4.4 Health and Safety Passport modules</b>	<b>6</b>
<b>4.5 Details of Health and Safety Passport Card</b>	<b>6</b>
<b>5. ASSESSMENT</b>	<b>7</b>
<b>5.1 Modules</b>	<b>7</b>
<b>5.2 Final assessment</b>	<b>7</b>
<b>6. AWARD, CUSTODY AND VALIDITY OF THE HEALTH AND SAFETY PASSPORT</b>	<b>7</b>
<b>6.1 Award</b>	<b>7</b>
<b>6.2 Custody</b>	<b>7</b>
<b>6.3 Validity</b>	<b>7</b>
<b>Annex A Diagrammatic example of SAFed Health and Safety Passport Card</b>	<b>8</b>

## **1. INTRODUCTION**

- 1.1 SAFed is the lead trade body for companies that undertake a range of work activities that include the independent safety examination, quality assessment, and certification of machinery, plant, equipment and installations both mechanical and electrical in a wide variety of industries. One of SAFed's main aims is to improve operational safety in industry by establishing and maintaining high operational and performance standards. By becoming a member of SAFed, companies are expressing their determination and will to demonstrate high professional standards in all their examination and certification related activities.
- 1.2 One of the key elements of a company being able to deliver and maintain a high level of operational and performance standards, is the employment of Engineer Surveyors with the appropriate demonstrable competency to undertake their specific work activities in a safe manner.
- 1.3 The purpose of this Specification is to:
  - (a) Define a framework for the health and safety training of personnel that will help ensure that Engineer Surveyors carry out their duties in a safe manner.
  - (b) To detail the process for awarding of a SAFed Health and Safety Passport to Engineer Surveyors.
- 1.4 Member companies that comply fully with this Specification are demonstrating their commitment to employing Engineer Surveyors who are able to carry out their duties in a manner of appropriate and demonstrable competency in health and safety practice.
- 1.5 Application and management of the Scheme is the responsibility of member companies. Initial assessment and annual surveillance to confirm SAFed member company compliance with the Scheme is carried out as part of their UKAS assessment.
- 1.6 The SAFed Health and Safety Committee (TC9) is responsible for the ongoing review and maintenance of the Passport Scheme including training modules and examination questions.
- 1.7 Member companies have formally documented training plans for individual Engineer Surveyors in accordance with SAFed Standard 01:2001 (SS01:2001) "Recruitment, Training and Competency of Engineer Surveyors". SS01:2001 describes the process for the recruitment, training and competency of Engineer Surveyors by SAFed member companies and includes extensive requirement for initial health and safety training and assessment of individual health and safety practice.

## **2. SCOPE**

- 2.1 This Specification encompasses the initial Health and Safety awareness training for new Engineer Surveyors and the process for awarding of Health and Safety Passports for new and existing Engineer Surveyors.
- 2.2 The Specification describes the activities that member companies shall undertake in order that appropriate health and safety practice of their Engineer Surveyors is maintained.
- 2.3 The Specification is generic in that it applies to all Engineer Surveyors, however described by their company, and employed in whatever discipline or combination of disciplines at whatever level.

### 3. DEFINITIONS

For the purpose of this Specification the following definitions shall apply:

**Engineer Surveyor** - Person who has been assessed and authorised by their employing company as holding the required level of competency.

**Health and Safety Manager** - Person, however designated, who is qualified and experienced in the operations of their company and who has the responsibility for ensuring the Health and Safety training of their Engineer Surveyors.

**Health and Safety Passport** - Document confirming that the holder has completed a period of study in health and safety awareness and has successfully completed an end of study examination.

**Module** - Unit of study material on a specific aspect of health and safety.

**SAFed Health and Safety Committee (TC9)** - Committee formed by member companies to consider health and safety matters.

### 4 GENERAL FEATURES OF THE SPECIFICATION

#### 4.1 Introduction

This Specification identifies the syllabus in the form of modules and the procedure for awarding the SAFed Health and Safety Passport. It is awarded to Engineer Surveyors following study of the modules and successful completion of a formal written examination covering all modules.

#### 4.2 Recruitment and initial training

All SAFed member company Engineer Surveyors are recruited and trained in accordance with Safety Assessment Federation Standard 01:2001 (SS01: 2001) "Recruitment, Training and Competency of Engineer Surveyors".

#### 4.3 Applicability of Health and Safety Passport to industry sectors

The SAFed Health and Safety Passport demonstrates that the holder has successfully completed a period of health and safety training and has passed a multiple choice examination covering health and safety issues applicable to engineer surveyors undertaking their specific examination activities for all industry sectors including:

Construction

Quarries

Food industry

Paper industry

Petrochemical

Manufacturing

Utilities

Retail

Docks

#### **4.4 Health and Safety Passport Modules**

The Passport Scheme comprises a number of modules designed to cover the health and safety standards and hazards that may be found in the industries specified in clause 4.3 of this Specification.

##### **Module No**

- 1 Overview of Health, Safety and Environmental Law
- 2 Responsibilities and communication lines
- 3 Risk assessment methodology
- 4 Safe Systems of Work
- 5 Workplace safety, access and egress
- 6 Emergency Procedures including fire safety
- 7 Occupational health
- 8 Accident, first aid and reporting procedures
- 9 Manual handling and musculoskeletal issues
- 10 Work equipment
- 11 Electricity in the workplace
- 12 Safety signs
- 13 Personal protective equipment
- 14 Workplace transport safety
- 15 Working at heights
- 16 Confined spaces
- 17 Quarries

#### **4.5 Details of SAFed Health and Safety Passport Card**

Credit card sized document containing the SAFed logo and the following details

Holder's name

Photograph of the holder

Employing company

Date of expiry of the passport

[Note: A diagrammatic example is shown at Annex A]

The employing company shall, in accordance with this Specification, be responsible for awarding the Passport. The employing company shall maintain a register of holders of the Passport.

## **5. ASSESSMENT**

### **5.1 Modules**

Modules shall be provided by member companies to their Engineer Surveyors for self study. After completing the self study on a module, engineer surveyors shall forward answers to questions on that module to their respective Health and Safety Manager for marking. Only when Engineer Surveyors have demonstrated a full understanding of the module which they have just studied, will their employing company provide them with the next module for self study.

### **5.2 Final assessment**

Final assessment shall be by multiple choice examination for which the following criteria shall apply.

- a) Examination papers shall be set by the employing member company using questions from the agreed question bank. The examination shall contain at least 100 questions covering all the modules.
- b) The examination is to be supervised by an appointed person from within the employing member company authorised by the Health and Safety Manager.
- c) The examination shall be closed book.
- d) The pass mark shall be 80% with candidates receiving individual coaching on deficiencies identified. Failure to pass the examination will necessitate the Engineer Surveyor undergoing a further period of instruction before re-taking the examination.
- e) Examination papers are to be retained by the member company for a period of three years

## **6 AWARD, CUSTODY AND VALIDITY OF THE PASSPORT**

### **6.1 Award**

The award of the Health and Safety Passport is designed for both new Engineer Surveyors and those currently employed as Engineer Surveyors. Following satisfactory completion of the training programme based upon the modules, the Health and Safety Manager, having fully reviewed the health and safety training on health and safety awareness, shall award a Health and Safety Passport. The Passport shall be subject to periodic re-evaluation, in no case longer than three years.

### **6.2 Custody**

Both the employing company and individual Engineer Surveyors shall hold a copy of the Health and Safety Passport.

### **6.3 Validity**

Health and Safety Passports shall remain in force until an Engineer Surveyor either:

- Fails to maintain the necessary level of health and safety competency, or
- Ceases to be employed by a SAFed member company operating in full compliance with this Specification

# ANNEX A

## Diagrammatic example of SAFed Health and Safety Passport Card

