

ON-SITE ASSESSMENT PREPARATION CHECKLIST (PRELIMINARY)

When selected as a Finalist for the Robert W. Campbell Award, the next stage of the review process includes an on-site assessment of company operations. The assessment will be conducted by Robert W. Campbell (RWC) Award Assessors, over a 2-day period to verify, clarify, and augment information presented in your RWC application. Assessments may be conducted at headquarters, with additional visits to selected operations sites.

This checklist is provided so that Finalists know what is expected for an efficient and effective on-site assessment.

ITEM / ACTIVITY	
<input type="checkbox"/> Logistics *	<p>Official primary contact information and alternate contact information, in the event that the primary contact is unavailable.</p> <p>The RWC Administrator will work with the Finalist to decide on the operation site(s) for assessment and arrange for Assessors' transportation and lodging convenient to the site(s). Transportation between the airport, hotel, and site(s) will be provided by the Finalist.</p>
<input type="checkbox"/> Agenda *	<p>Please outline the schedule for each day, including times, locations, transportation, and personnel. A day will generally start at 8:00am and end at 4:30pm. Modifications to this schedule may be made, as appropriate.</p>
<input type="checkbox"/> PowerPoint Presentation	<p>Finalist is to prepare a 30-minute presentation summarizing the application and highlighting the corporate practices in SH&E and how SH&E is integrated into the operation system and contributes to business performance.</p>
<input type="checkbox"/> Meeting with Management	<p>Meeting should be arranged for the assessor(s) to interview with various levels of management including one of more executive level personnel.</p>
<input type="checkbox"/> Interviews with Employees	<p>Employees from all levels will be interviewed. With consent from the employees, the Assessors should be free to conduct interviews with randomly selected employees during assessment. If necessary, rooms should be available for more in-depth interview.</p>

ITEM / ACTIVITY	
<input type="checkbox"/> Evidence Binder	<p>This binder will be used to facilitate the on-site assessment and to provide evidence to verify, clarify, or augment information provided in the application. Suggested content includes but not limited to:</p> <ul style="list-style-type: none">▪ Organizational Charts – This should describe responsibilities and interrelationship among the various business groups, department, and key functions.▪ Business Operation Map – This should cover the business units, their main businesses, and geographical locations▪ Integrated Procedures and Processes - This can be a collection of Tables of Contents from manuals and documents of key activities that demonstrate the integrated nature of the SH&E and overall operations▪ Certificates – This should include a collection of other recognition and certification, e.g. ISO certifications.▪ Performance Measures – This should describe the key performance measures, how they are defined, reported, recorded, analyzed, and used for continuous improvement. <p>The Assessors should be able to access documents specifically cited in the RWC application. In addition, supporting documentation shall be made available for review.</p> <p>It is recommended that the assessors be accompanied by an escort with authorization to access areas and documents as necessary to conduct the assessment.</p>

* Information should be made available to the Award Administrator three days prior to the visit.

This checklist is for preliminary informational purposes only and is subject to change. A complete checklist will be provided if your organization is selected as an RWC Award Finalist.