

Section 1

The Service Provider is to establish a fully functional, QCTO/SETA-ready HSE e-Learning Academy for SABS. The Service Provider is responsible for the following:

1. **Project Management & Planning:** Submit a detailed project plan with clear milestones and timelines for the establishment of the Academy. Max 12-month period
2. **Development of Learning Content:** Create all learning materials (manuals, presentations, videos, assessments) for the specified courses, ensuring they are of high quality and pedagogically sound.
3. **Platform & Infrastructure:** Set up and configure a Learning Management System (LMS) to host the content and manage learner records. (Can be a 3rd party)
4. **Accreditation Preparation:** Ensure all content, assessments, and facilitator qualifications meet the requirements for accreditation with the relevant SETA and/or the QCTO. This includes preparing all necessary documentation for the accreditation application.
5. **Training and Handover:** Upon completion, provide training to SABS personnel on how to manage and administer the Academy.

Number	Course Name	Unit Standard
First Aid & Emergency Response		
1	First Aid Level 1 – Basic Life Support (BLS)	119567
2	First Aid Level 2 – Intermediate First Aid & Primary Emergency Care	120496
3	First Aid Level 3 – Advanced First Aid, Defibrillation & Medical Evacuation	254135
4	CPR & AED (Automated External Defibrillator) Usage	254129

5	Emergency Evacuation Procedures & Fire Drills	242825
6	Emergency Preparedness & Response Planning	244547
Legal & Management Systems		
7	OHS Act Orientation & Legal Liability for Managers/Supervisors	242668
8	OHS Act Awareness & General Duties for all Employees	9964
9	HSE Representative Training – Functions, Powers & Inspections	12455 / 376981
10	Health & Safety Committee Functions & Meeting Procedures	259620
11	Incident & Accident Investigation – Root Cause Analysis	115087
12	Hazard Identification & Risk Assessment (HIRA) – Baseline & Task-Based	244383
Working at Height & Fall Protection		
13	Ladder Safety & Inspection – Pre-Use & Periodic Checks	229998 (Awareness)
14	Scaffolding Safety – Erection, Inspection & Dismantling	229998

15	Working at Heights & Fall Protection – Harness & Lanyard Inspection	229995
16	Fall Arrest Systems & Rescue Planning	229995 (Advanced)
Lifting Machinery, Cranes, Rigging & Forklifts		
17	Forklift Safety & Operations – Pre-Use Inspections & Load Handling	258958
18	Overhead Crane & Hoist Operations – Safe Work Loads (SWL)	253644
19	Rigging & Slings Safety – Shackles, Slings, Chains & Hooks	253638
20	Lifting Tackle Inspection & Colour-Coding Verification	253638
21	Lifting Plans & Critical Lift Management	
Hazardous Chemicals & Substances		
22	Hazardous Chemical Substances (HCS) – Identification & Handling	115093
23	Safety Data Sheets (SDS) – Interpretation & Application	115093
24	Chemical Spill Prevention, Control & Countermeasure (SPCC)	

Waste & Environmental Management		
25	Hazardous Waste Management – Segregation, Storage & Disposal	123257
26	General Waste Management & Minimisation (Recycling & Re-use)	123257
27	Environmental Awareness & ISO 14001 Fundamentals	113852
28	Apply Environmental Principles in the Workplace	113852
Occupational Health & Ergonomics		
29	Ergonomics in the Office & Laboratory Settings	9965
30	Manual Handling – Safe Lifting Techniques & Load Sharing	9965
31	Noise-Induced Hearing Loss (NIHL) & Audiometric Testing Awareness	229940
32	Thermal Stress Management (Heat/Cold Stress)	N/A
33	Indoor Air Quality & Ventilation Awareness	N/A
High-Risk Operational Controls		

34	Electrical Safety & Lock-Out Tag-Out (LOTO)	252250
35	Confined Space Entry & Rescue	15034
36	Trenching & Excavation Safety	N/A
37	Safe Work Procedures (SWP) – Development & Application	N/A
38	Permit to Work (PTW) – Issuing, Acceptance & Control	N/A
39	Contractor Management & HSE File Compliance	N/A
Behavioural Safety & General		
40	SABS HSE Employee Induction (Policy, Risks, Emergency Procedures)	N/A
41	Behavioural-Based Safety (BBS) – Observations & Interventions	N/A
42	Fatigue Management for Operators & Shift Workers	N/A

Section 2

HSE Management System Digitalisation

1. System Architecture & Setup

What the Service Provider must do:

- Design and build a custom HSE Management System on SABS SharePoint that serves as the single source of truth for all HSE documentation, replacing current shared drives.
- Create a site hierarchy for all SABS regions and departments
- Configure user roles and permissions to enforce role-based access control and data segregation.

2. Documented Information Control (ISO 45001 / ISO 14001 Clause 7.5)

What the Service Provider must do:

- Implement a rigorous Document Control System to manage all "documented information". This is a direct requirement under ISO 45001:2018 and ISO 14001:2026. The system must support:
 - Creation & Updating: Version control with a full revision history, including who made changes and when.
 - Review & Approval: Automated workflows for the review and approval of documents by authorised personnel before publication.
 - Availability at Points of Use: Current versions of critical documents, such as Safe Work Procedures (SWP) and Risk Assessments, must be easily accessible to employees at the right time and place, including on mobile devices.
 - Control of External Documents: The system must be able to identify, store, and control external documents (e.g., Safety Data Sheets from suppliers, legal acts, manufacturer manuals).
 - Protection & Retention: Safeguards to prevent unauthorised changes and ensure document integrity. It must also support retention and disposition policies.
 - Obsolete Document Control: A mechanism to clearly mark outdated documents and prevent their unintended use.

3. Template & Form Creation

What the Service Provider must do:

- Develop and configure digital templates for all mandatory and frequently used documents, including:
 - Hazard Identification and Risk Assessments (HIRA).
 - Safe Work Procedures (SWP).
 - Audit Checklists and Inspection Forms.
 - Incident/Accident Investigation Reports.
 - Appointment Letters (aligning with NOSA CMB253 requirements).

4. Data Management & Digitalisation

What the Service Provider must do:

- Convert and migrate existing HSE documentation (policies, standards, registers) from shared drives into the new digital system.
- Migrate existing data from legacy forms and checklists into the new SharePoint environment.
- Populate the system with the HSE content created in Phase 1 to ensure the documentation is automatically linked to the relevant training records.

5. Mobile Auditing & Reporting System

What the Service Provider must do:

- Develop and implement a mobile auditing and inspection system that operates on tablets (Android- and iOS-compatible) for use by HSE auditors, inspectors, and HSE representatives during site inspections.
- The mobile system must allow auditors to:
 - Complete inspection checklists digitally on-site, without requiring an internet connection (offline capability).
 - Capture photographic evidence of findings directly within the inspection report.
 - Tag and classify non-conformances by type (e.g., safety, health, environmental, equipment, procedural).
 - Assign priority levels to non-conformances (e.g., Critical, High, Medium, Low) based on risk severity.

- Record location data (GPS) and department/area details for each finding.
- Automated Report Generation: Upon completion of an inspection, the system must automatically generate a comprehensive inspection report, including:
 - Summary of findings and overall compliance rating.
 - Detailed list of all non-conformances with photographic evidence.
 - Prioritised corrective action plan with responsible persons and due dates.
 - Trend analysis of repeat non-conformances.
- Non-Conformance Logging to Facilities: The system must seamlessly integrate with SABS's existing facilities management system (or a designated facilities ticketing system). All non-conformances that require facilities intervention (e.g., building maintenance, electrical repairs, plumbing, structural issues) must be automatically logged as facilities work orders/tickets, including:
 - Description of the non-conformance.
 - Photographic evidence.
 - Location and department details.
 - Priority level.
 - The system must provide a tracking mechanism for SABS to monitor the status of each facility's work order until closure.
- Dashboard & Analytics: The system must provide a real-time dashboard for SABS management showing:
 - Open vs. closed non-conformances.
 - Non-conformance trends by department, region, and category.
 - Facilities work order status (open, in progress, closed).
 - Average closure times for corrective actions.
- Integration: The mobile auditing system must integrate with the SharePoint HSE Management System to ensure all inspection reports and non-conformance data are automatically saved to the central repository.
- Training & Handover: Provide training to all HSE auditors, inspectors, and HSE representatives on the use of the mobile auditing system, including:
 - How to complete inspections on tablets.
 - How to log non-conformances.
 - How to track corrective actions and facilities work orders

Section 3 Services

3.1 Daily Services (Via Business Units)

The Service Provider must perform the following services daily:

- Incident Reporting & Communication: Immediately notify SABs of any reportable incidents via phone call; complete an initial incident report within 24 hours of the occurrence.
- Pre-Use Equipment Inspections: Ensure operators complete daily checklists for all forklifts, cranes, lifting tackle, and mobile equipment before use each day.
- Hazardous Waste Storage Inspection: Conduct a visual inspection of all hazardous waste storage areas daily; report any leaks, spills, overfilled containers, or other non-conformances immediately.
- Ladder & Scaffolding Visual Check: Supervisors must conduct a visual check of any ladders or scaffolding in use that day to ensure they are safe for use.

3.2 Weekly Services

The Service Provider must perform the following services weekly via business units:

- Toolbox Talks / Safety Meetings: Conduct toolbox talks or safety meetings with employees; document attendance and topics covered.
- Scaffolding Inspection: A competent person must inspect all erected scaffolding and produce an inspection report with sign-off.
- Portable Electrical Equipment Inspection: Inspect all portable electrical tools and equipment.
- Hazardous Chemical Substance (HCS) Storage Inspection: Check all chemical storage areas for compatibility of stored substances, containment integrity, and proper labelling.

3.3 Monthly Services

The Service Provider must perform the following services monthly:

- Regional OHS Site Monitoring & Inspections: Conduct formal OHS site monitoring and inspections across all SABs regions; produce a Monthly Compliance Dashboard and an OHS Monitoring Report with a detailed Action Plan for each region.
- Environmental Monitoring Report: Produce a comprehensive Environmental Monitoring

Report with an accompanying Action Plan for identified issues.

- Fire & Emergency Equipment Monitoring: Produce a Fire & Emergency Equipment Monitoring Dashboard and Report, detailing the status of all firefighting and emergency equipment nationally.
- Lifting Equipment & Machinery Monitoring: Produce a Lifting Equipment and Machinery Monitoring Dashboard and Report, tracking the condition and inspection status of all lifting equipment.
- Legal Appointments & Training Matrix Report: Produce a report on the status of all legal appointments and the HSE training matrix, highlighting any vacancies or expired appointments.
- HSE Representative Inspections: All HSE representatives must complete monthly inspection checklists based on area-specific risk profiles; reports must be forwarded to the assigned manager for corrective action.
- Waste Audits (High-Risk Sites): Conduct site waste audits at Secunda, Netfa, and Groenkloof; produce reports and action plans for each site.
- Hazardous Chemical Substances (HCS) Inventory Update: Develop and maintain an HCS inventory for all applicable departments and areas, including volumes and quantities of all hazardous substances.
- Shared Drive Document Update: Update the shared drive with all documents assessed between SABS and the Service Provider.
- Portable Electrical Equipment Register Update: Update the register of all portable electrical equipment; document all inspection results and corrective actions taken.
- Ladder Register Update: Update the register of all ladders on site; document all inspection results and corrective actions taken.
- Lifting Tackle Register Update: Update the register of all lifting tackle (slings, shackles, chains, hooks); document colour-coding verification and inspection results.
- PPE Issuance & Usage Verification: Verify PPE issuance records; check the condition of issued PPE and compliance with usage requirements; document all findings.
- First Aid Kit Surveys (Quarterly): Conduct quarterly surveys of First Aid Kits nationally, checking stock availability and validity of contents.
- Safety Data Sheet (SDS) Verification: Review and ensure all Safety Data Sheets are legally compliant in their respective departments.
- HSE Committee Meetings: Attend HSE Committee meetings as required; document minutes and action items.

- **Monthly Incident Statistics:** Compile monthly incident statistics, including DIFR (Disabling Injury Frequency Rate) and other frequency rates, for reporting to management.
- **Monthly Audit Rating Score (MARS):** Evaluate general compliance with the site HSE plan; calculate and report the Monthly Audit Rating Score.
- **Colour Coding Verification:** Verify the colour-coding of plant, equipment, and pipelines; report all non-compliances.
- **HSE Performance Experience Board Update:** Update the HSE Performance Experience Board with the current star grading, DIFR, and incident statistics.
- **Survey Action Plan Tracking:** Track all survey action plans and report progress to SABS monthly.

3.4 Quarterly Services

The Service Provider must perform the following services quarterly:

- **Comprehensive Site Inspection – Groenkloof:** Conduct a comprehensive site inspection at the Groenkloof headquarters; produce a detailed report with findings and corrective actions.
- **Auditing of Departments on Site (Quarterly):** Conduct formal HSE audits of all departments at the Groenkloof site quarterly; produce audit reports with non-conformances and corrective actions.
- **Regional Audits (Monthly):** Conduct formal HSE audits of all regional sites (East London, Cape Town, NETFA, CSIR, Secunda, Richards Bay, Newcastle, Durban, PE) monthly; produce audit reports with non-conformances and corrective actions.
- **HSE Procedures Review & Update:** Review and update all existing SABS HSE procedures; develop new procedures as required.
- **Lifting Plan Review:** Audit all high-risk lifting plans; verify SWL/WLL markings and competency of operators.
- **Crane & Lifting Equipment Thorough Inspection:** Conduct a thorough visual inspection of all cranes and lifting equipment; document all findings.
- **Scaffolding Register Review:** Review the scaffolding register; verify inspection records and corrective actions.
- **Near-Miss Reporting System Review:** Review the near-miss reporting system; analyse trends and recommend improvements.
- **Internal HSE Audit:** Conduct a formal internal HSE audit against NOSA CMB253 requirements; produce a report with non-conformances and corrective actions.

- **Emergency Equipment Register Review:** Review and update the emergency equipment register.
- **Legal Compliance Audit:** Conduct a legal compliance audit against the OHS Act and other applicable legislation.
- **Contractor Performance Review:** Review contractor HSE performance and compliance.
- **Stormwater Discharge Monitoring Report:** Produce a quarterly stormwater discharge monitoring report.
- **Management Review Meeting:** Facilitate a management review meeting with top management; document all decisions and action items.
- **HSE System Review:** Conduct a formal HSE System Review with the CEO and Top Management to assess the suitability, adequacy, and effectiveness of the HSE system.
- **Off-the-Job HSE Incident Reporting:** Promote the reporting of off-the-job HSE incidents to workers to extend the safety culture beyond the workplace.
- **Rigging Gear Colour-Code Audit:** Verify the colour-coding and inspection status of all slings, chains, shackles, and hooks.

3.5 Bi-Annual Services

The Service Provider must perform the following services on a bi-annual basis:

- **HSE Emergency Drills:** Conduct HSE emergency drills nationally, covering fire, environmental, first aid, and working at height rescue scenarios; produce reports, attendance registers, and photographic evidence.
- **Lifting Machinery Thorough Inspection:** A competent person must inspect all lifting machinery, appliances, equipment, and tackle and produce certification reports.
- **HSE Gifts Distribution:** Distribute HSE Gifts to employees (1 gift per year as agreed between SABS and the Service Provider, not exceeding R150 per employee).
- **HSE Event/workshop (Nationally):** Conduct a national HSE Event/workshop (max R25,000 per event excluding VAT).
- **Working at heights training/refresher**
- **Formal Internal Audit (Bi-Annual):** Conduct a formal bi-annual internal audit of the entire HSE management system.
- **Suggestion Scheme Review:** Review the employee suggestion scheme; implement feasible suggestions.

3.6 Annual Services

The Service Provider must perform the following services on an annual basis:

- National Annual HSE Plan: Provide a national annual HSE plan by 31 January each year.
- Full HSE Audit: Conduct a full HSE audit against the OHS Act, ISO 45001, ISO 14001, and NOSA CMB253; provide a report with corrective actions.
- SOP Training: Conduct annual Standard Operating Procedure (SOP) training.
- Risk Assessment Training: Conduct annual Risk Assessment training.
- Toolbox Talk Training: Conduct annual Toolbox Talk training.
- Hazardous Chemical Spill Kit Survey & Training: Conduct an annual survey of all hazardous chemical spill kits and provide training on their use.
- Hazardous Chemical Spill Kits Supply: Supply 3 hazardous chemical spill kits per year.
- Ladder Safety & Working at Height Training: Conduct annual e-Learning and practical assessment for Ladder Safety and Working at Height.
- Forklift & Crane Operator Competency Review: Review forklift and crane operator licences and competency; document findings and training needs.
- Environmental Monitoring: Conduct annual environmental monitoring for all sites as prescribed by legislation and local bylaws.
- Water Sampling & Testing: Conduct annual water sampling and testing at all sites.
- First Aid Kit Survey: Conduct an annual national survey of First Aid Kits (stock availability and validity).
- Hygiene Survey Action Plans: Develop, review, and update Hygiene Survey Action Plans; engage relevant SABS stakeholders.
- Signage Survey: Maintain existing Signage Surveys throughout SABS Premises nationally.
- HSE Training Matrix Update: Identify HSE training needs and provide an updated HSE training matrix for each department and area.
- SDS Review: Review and ensure all Safety Data Sheets are legally compliant in their respective departments.
- Baseline OHS Risk Assessment: Conduct and/or review the existing OHS Baseline Risk Assessment for all SABS operations and activities.
- Issue-Based & On-the-Job Risk Assessment: Revise Issue-based and On-the-job risk assessments with control measures.
- PPE Requirement Survey: Review and update existing PPE requirement surveys for each department and area.

- Aspect & Impact Assessment: Conduct aspect and impact assessments nationally (must be site-specific).
- Hazardous Substances Risk Assessment: Conduct formal risk assessments for all hazardous chemical substances identified on site.
- Management Review Meeting: Facilitate an annual management review meeting with top management.
- HSE Performance Experience Board Update: Update the HSE Performance Experience Board with the current star grading and date.
- Consolidated Statistics: Compile annual consolidated statistics for comparative purposes.
- Cost of Risk Report: Compile an annual Cost of Risk report covering insurance, losses, claims, and other related costs.
- Annual HSE Report: Compile an annual HSE report for external communication and interested parties.

3.7 Every 2 Years Services (Contract Period)

The Service Provider must perform the following services every 2 years:

- HSE Organogram Review & Update: Develop, review, and update HSE organograms for all departments nationally.
- Legal Appointments Review & Coordination: Review and coordinate all legal appointments for SABS nationally, including providing status updates for the validity of appointments and vacancies.
- Aspect & Impact Profile Development: Develop the SABS aspect and impact profile (Environmental).
- Hazard & Risk Profile Development: Develop and maintain the SABS Health and Safety Hazard and Risk Profile, identifying workplace hazards, assessing associated risks, determining control measures, and monitoring their effectiveness. Review and update the existing SABS risk profile.
- Emergency Plans Review & Update: Review existing emergency plans and processes; update them accordingly.
- Emergency Plans Development: Write, review, and amend new Emergency plans and processes where required.
- Management of Change Review: Review and update the Management of Change system.

Section 4 Surveys

4.1 First-Year Approved Inspection Authority (AIA) Surveys

The Service Provider must ensure that all statutory surveys required by legislation and the NOSA CMB253 system are conducted twice during the contract period. All surveys listed in this section must be conducted by an Approved Inspection Authority (AIA) as required by the OHS Act and its regulations.

The following surveys must be conducted once within the first year:

- **National Greenhouse Survey:** Survey as per Annexure 1 of the National Greenhouse Gas Reporting Regulations. The survey must quantify greenhouse gas emissions from all SABS operations and activities nationally.
- **Carbon Tax Assessment:** Conduct an assessment as per Schedule 2 of the Carbon Tax Act. The assessment must determine SABS's carbon tax liability and identify opportunities for reduction.
- **Heat / Cold Stress Survey:** Assess thermal stress risks in all workplaces where employees may be exposed to extreme temperatures, including plant rooms, laboratories, outdoor areas, and industrial settings. The survey must identify controls required to manage thermal stress.
- **Noise Survey:** Conduct noise dosimetry and area monitoring to identify hearing conservation requirements. The survey must identify all areas where noise levels exceed legislative limits and recommend controls.
- **Illumination Survey:** Assess lighting levels in all work areas against SANS 10114 standards. The survey must identify areas with insufficient or excessive lighting and recommend corrective actions.
- **Ventilation Survey:** Assess indoor air quality, gases, and fumes emitted in all work areas. The survey must identify areas with poor ventilation and recommend improvements.
- **Chemical Risk Assessment:** Assess all hazardous chemical substances in use at SABS; identify health and safety risks associated with each substance. The assessment must recommend controls and PPE requirements.
- **Chemical Compatibility Survey:** Assess the compatibility of all chemicals stored and used on site; update the chemical inventory. The survey must identify incompatible chemicals and recommend safe storage arrangements.
- **Stack Emissions Survey:** Assess emissions from all stacks and flues against legislative

requirements. The survey must identify any exceedances and recommend corrective actions.

- **Dust Survey:** Assess dust levels in all work areas; identify controls required to manage dust exposure. The survey must identify areas where dust levels exceed legislative limits.
- **Water Sampling and Testing:** Conduct water quality testing at all sites as prescribed by legislation. The survey must include testing for chemical, biological, and physical parameters.
- **Ergonomic Survey:** Assess ergonomic risks in office, laboratory, and industrial settings. The survey must identify tasks with high ergonomic risk and recommend controls.
- **Asbestos Survey:** Identify and assess all asbestos-containing materials on site. The survey must include a register of all asbestos-containing materials and a management plan.
- **Soil Sampling and Testing:** Assess soil contamination at all sites; identify remediation requirements. The survey must identify any contaminated areas and recommend remediation actions.
- **Stormwater Sampling and Testing:** Assess stormwater quality against legislative requirements. The survey must identify any exceedances and recommend corrective actions.

4.2 Survey Deliverables

For each survey conducted, the Service Provider must deliver the following:

- **Comprehensive Survey Report:** A detailed report for each survey conducted, including the methodology used, findings, identified non-conformances, and a corrective action plan with responsible persons and deadlines.
- **AIA Certificate:** A certificate from the Approved Inspection Authority confirming that the survey was conducted in accordance with legislative requirements.
- **Risk Register Update:** An update to the centralised risk register with all new findings and controls identified during the survey.
- **Action Plan:** A detailed action plan with responsible persons and deadlines for all corrective actions identified during the survey.
- **Trend Analysis:** An annual comparative analysis of survey results against previous surveys to identify trends and measure improvement.
- **Chemical Risk Assessment Report:** A formally documented risk assessment for each hazardous chemical substance, including control measures and PPE requirements.
- **Survey Action Plan Tracking:** All survey findings must be tracked every month until closure, with progress reported to SABS