



Construction & Maintenance Education Foundation  
CONTRACTOR/OWNER INVESTMENT PROGRAM AGREEMENT 3  
Revised 6-06



## ROLES AND RESPONSIBILITIES

### Role of Contractor Investor

Companies who choose to support CMEF in the following ways are considered COIPA 3 Contractor Investors (COIPA 3 CI):

1. Within the guidelines stated in item 3, a COIPA 3 CI will contribute a minimum of \$.06 per work-hour to support CMEF craft workforce development programs. Work-hours are defined as all hours by contractors involved in new construction, turnarounds, outages, shutdowns, maintenance capital projects, renovation, demolition, and routine maintenance activities, as accumulated on the OSHA 300 Log, within the Greater Houston Chapter territory.\*
2. It is the responsibility of the COIPA 3 CI to encourage clients to include funding support for CMEF in all applicable contracts.
3. A COIPA 3 CI is urged to contribute for all work hours, but may exempt certain work hours where:
  - a. the contractor does not have funding in an existing contract.
  - b. the owner refuses to support funding in any manner.
  - c. the owner is paying all funding direct to CMEF.
  - d.

**The COIPA 2 CI will submit monthly work hour reports by job site and include work hours where funding is not paid (See exempt hours, item #3).**

4. A COIPA 3 CI will designate one person within their organization to provide monthly work hour reports to CMEF. This person shall compile information from all sites and submit one report to CMEF each month. Hours must be reported by site.

Contractors may choose two methods of reporting:

- a. Contractor shall submit work hour report electronically by the 15<sup>th</sup> of each month. CMEF will generate an invoice for payment.
- b. Contractor shall submit work hour report with payment attached.

See Appendix A for work hour report.

5. A COIPA 3 CI will start funding payments immediately after this agreement is signed for all applicable craft work hours. A COIPA 3 Contractor may elect to remit payment to CMEF after reimbursement by the Owner Investor.
6. COIPA Status is granted on a month to month basis. Failure to adhere to this agreement will result in loss of COIPA Status and discounts associated with this agreement.
7. CMEF reserves the right to monitor COIPA 3 agreements to ensure that funding offsets the cost of contractor's participation in CMEF programs. CMEF further reserves the right to invoice COIPA 3 CI companies for training not covered by work-hour funding.



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Role of Owner Investor- Owner Investors (OI) are those companies which award work to the contractor community and are thus referred to as "Owners." The role the OI plays is critical to the success of this program in that it is the Owners who set the standards of excellence within the world of maintenance and construction.

**See Appendix B**

**Role of CMEF**

**Funded Programs:** The money collected by CMEF from Contractors Investors will be used for all CMEF craft workforce development programs. CMEF agrees to provide the COIPA 3 Contractors with reduced rates for all applicable workforce development programs.

**Publicity/Promotion:** CMEF will frequently publish lists of the Contractor and Owner Investors to the industry and the general public.

**Membership:** In lieu of a full membership to ABC, a COIPA 3 signer is only required to pay an annual fee of \$500.00 to be paid to ABC. A COIPA 3 signer will not be eligible for any benefits provided by ABC membership.

**General Agreement between Construction & Maintenance Education  
Foundation (CMEF)**

and

\_\_\_\_\_  
Company Name

As a voluntary member of the CMEF Contractor/Owner Investment Program 3, the undersigned accepts its role as a Contractor Investor as stipulated in this agreement.

AGREED:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

AGREED:

\_\_\_\_\_  
James Morris, CMEF President

\_\_\_\_\_  
Katrina Broussard, Director of Education

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date



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\* Greater Houston Area included the following counties:

Austin	Liberty
Brookland	Madison
Chambers	Montgomery
Colorado	Polk
Ft. Bend	Robertson
Galveston	San Jacinto
Gonzales	Trinity
Harris	Tyler
Houston	Walker
Leon	Waller



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## Appendix B

Houston Business Roundtable  
**KEY POINTS OF AGREEMENT**  
Contractor Craft Workforce Development

**Approved by HBR Operating Committee on April 13, 2006**

**Preamble:** We, the owner members of the Houston Business Roundtable (HBR), recognize the benefits of well trained and qualified contractor construction, maintenance and turnaround craft workers employed in our facilities as well as the need to assure an adequate supply of qualified workers in the future. Benefits have been measured in improvements in safety performance, productivity, work quality and rework, turnover, unexcused absences, morale and employer loyalty. We also support a community approach to craft workforce development and recruitment through the Construction and Maintenance Education Foundation (CMEF) and the collaborative efforts of owner and contractor companies. HBR owners will encourage and recognize workforce development excellence within the contractor community. Therefore, we agree to the following key points:

1. We will give preference to construction, maintenance and turnaround contractors that are committed to developing their craft employees and improving their skills by:
  - a. training all sub-journey level craft persons (at least 50 classroom hours per year) and encouraging graduation through an approved apprentice or craft training program<sup>1</sup> ;
  - b. providing upgrade training 1 to all journey level craft persons that have identified deficiencies through an approved skills assessment program. Persons already certified may be given upgrade training after reviewing specific site needs with the owner<sup>2</sup> ;
  - c. having a goal that leads to all journey level craft persons becoming certified through approved written assessment testing 2 and performance verified through an approved performance evaluation process<sup>2</sup> ;
2. We will use commitment to workforce development as a key factor for both prequalification and ongoing performance evaluation of construction, maintenance and turnaround contractors:
  - a. Pre-Qualification – We will evaluate a contractor’s overall corporate workforce development program including its workforce development plans regarding craft training, skills assessments, certifications, and performance verifications broken down by journey, sub-journey trainee, and apprentice or helper categories.
  - b. Site Contractor Auditing – We will require periodic reporting and evaluation of sub-journey level craft training and journey level skills upgrade training programs plus assessment, certification, and performance verification<sup>2</sup> status of all contract craft workers at our work sites.
  - c. Recruitment – We will strive to maintain a balance of at least 10% apprentices or sub-journey level trainees to encourage recruiting new craft workers into industry.
3. We fully endorse CMEF’s Contractor/Owner Investment Program (COIP) and, when using open shop contractors, will preferentially use contractors who have made a formal commitment to that program. Further, we agree to;
  - a. include in all construction, maintenance, and turnaround contracts with COIP contractors a minimum contribution of **\$0.06 per OSHA 300 log work** hour to help fund community-based craft training, assessment, and verification programs.
  - b. report periodically to CMEF **all OSHA 300 log work hours** worked by each COIP contractor at our plant and job sites.
  - c. audit quarterly our COIP contractors to hold them accountable for funding community-based craft training programs in accordance with the COIP agreement.



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- d. require all COIP contractors to report periodically to CMEF all eligible craft hours worked at our plant and job sites.
  - e. require CMEF to report quarterly to the HBR Contractor Workforce Development Committee the number of eligible **work** hours worked by COIP contractors at our plant and job sites versus the number of **work** hours for which the contribution has been collected.
  - f. Owners have option to fund CMEF directly rather than pass funds through Contractors.**
4. This “Key Points of Agreement” document will be reviewed at least biannually by the HBR Contractor Workforce Development Committee. The HBR Operating Committee will approve any changes.

**Notes:**

1. Approved Craft and Apprentice Training defined as National Center for Construction Educational and Research (NCCER) standardized craft training curriculum (a.k.a. Contren) or Department of Labor (DOL) Bureau of Apprenticeship Training program.
2. Approved Assessment and Verification Processes:
  - a. There will be no “grandfathering” of workers relative to assessment.
  - b. The approved programs for open shop contractors are the NCCER written assessment and performance verification programs.
  - c. For crafts where there are no approved (NCCER) skill assessments and performance verifications yet available, documentation by the contractor on how worker skills are assessed is required.
  - d. For assessments not yet developed by NCCER, it is expected that employees will be assessed within one year after the assessment becomes available.
  - e. Skills assessment results in a training prescription and upgrade training.
  - f. Skills assessments are intended for trained craft workers with typically 4 or more year’s industrial experience in targeted craft. Workers with less than typically 4 years industrial experience should be enrolled in an approved craft training program that will prepare them for certification.

Assessments and Performance Verifications Currently Available through NCCER

<u>Assessments</u>		<u>Performance Verifications</u>
Boiler Technician	Industrial Painter	Industrial Carpenter
Carpentry Level One	Industrial Pipefitter	Industrial Insulation
Commercial Carpentry	Instrumentation Fitter	Industrial Ironworker
Commercial Electrician	Instrumentation Technician	Industrial Maintenance Electrical
Concrete Finisher	Mobile Crane	Industrial Maintenance Mechanical
Core: Introductory Craft Skills	Reinforcing Iron and Rebar	Industrial Painter
Electronic Systems Technician	Rigging Fundamentals	Industrial Pipefitter
Finish Carpentry	Rigging	Instrumentation Technician
Form Carpentry	Scaffold Builder	Mobile Crane Operator
Frame Carpentry		Industrial Boilermaker
Heating, Ventilating, and Air Conditioning		Industrial Electrician
Industrial Boilermaker		Instrumentation Fitter
Industrial Carpentry		Industrial Millwright
Industrial Electrician		Scaffold Builder
Industrial Insulation		Concrete Finisher
Industrial Ironworker		
Industrial Maintenance:		



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Electrical Industrial Maintenance: Mechanical Industrial Millwright		Rigging Fundamentals Rigging Reinforcing Iron and Rebar
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**3. Eligible work hours are defined as all construction, maintenance, and turnaround work hours and apply to work hours as listed on the OSHA 300 log (includes timekeepers, supervision, safety personnel, etc.).**

4. Definitions:

- a. Trainees or apprentices are sub-journey level craft persons who are enrolled in approved craft training programs (NCCER or DOL approved curriculum).
- b. Journey level craft persons are experienced craft persons, typically with four or more years of field experience and are expected to have completed approved training in their chosen craft and/or have been certified through written skills assessment and evaluated through a performance verification program.