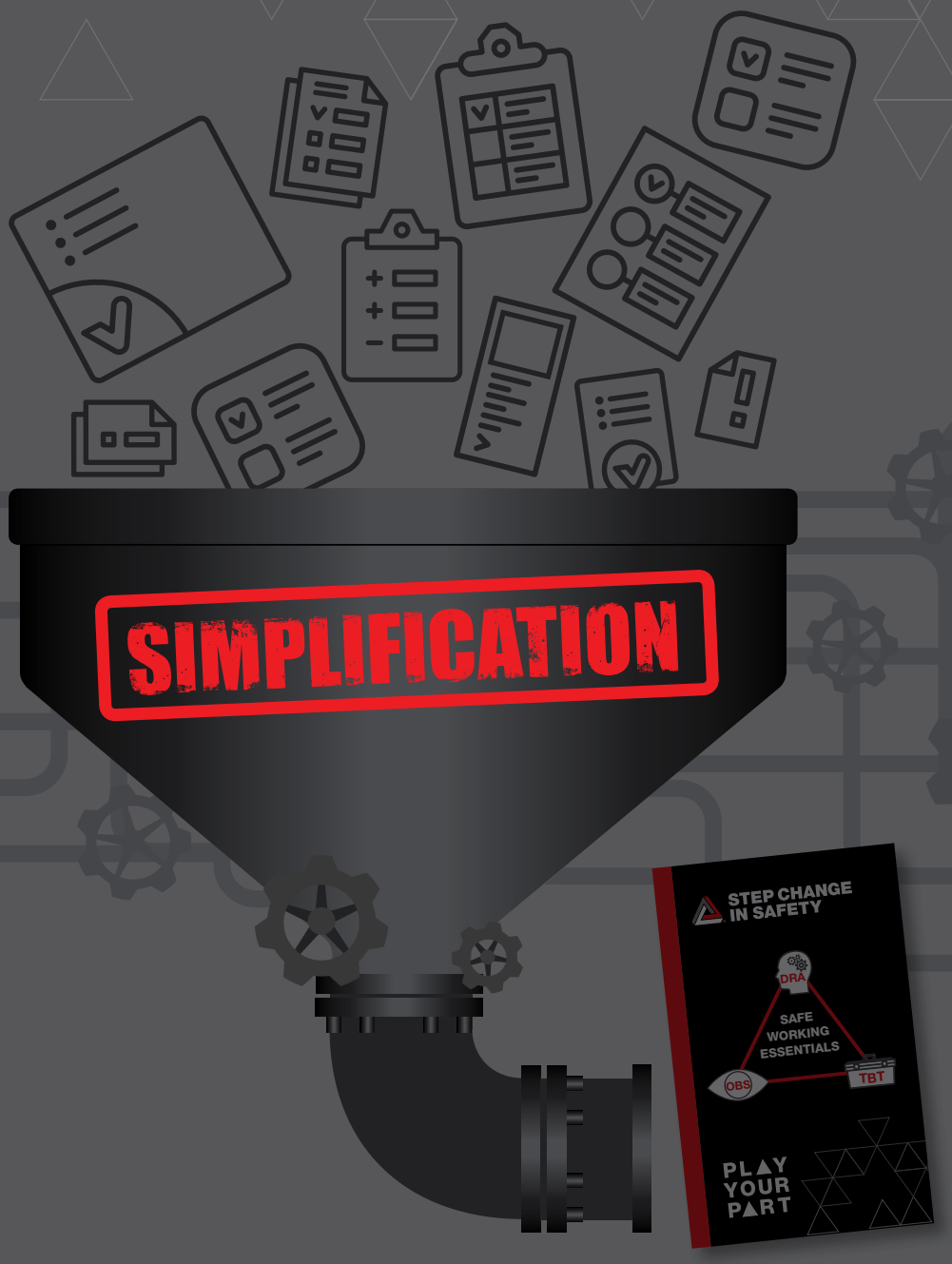

SAFE WORKING ESSENTIALS
GUIDANCE DOCUMENT

Improving safety and effecting change through collaboration

STEP CHANGE IN SAFETY

Preface

Approximately 5.3 million man-hours can be released over one year by simply saving an offshore worker 1 hour in their working day. This can be achieved in part by simplifying control of work tools (hazard identification, risk assessment, safety observation systems, dynamic risk assessments and standardise toolbox talks).

Safe Working Essentials is a suite of tools covering the control of work elements which are fundamental to reducing the likelihood of incidents at work. The tools are designed to be used as either stand alone or a suite of tools that support each other. As an example the hazards that are identified during the first steps of hazard identification flow through all of the other forms and throughout the process.

Safe Working Essentials is designed to improve and sustain performance. It is not solely focussed on occupational safety and has been proven to bring benefit to: occupational hygiene, environment, occupational safety, process safety, major accident prevention, human performance, reliability and efficiency across all aspects of our operation (projects, production and decommissioning).

This guidance expands upon the elements of;

- IOGP Life Saving Rules (LSR)
- Hazard Identification
- Risk Assessment
- Task Instruction
- Toolbox Talk
- Dynamic Risk Assessment
- Task Assurance
- Observation Card
- After Action Review

As part of supporting the global oil + gas industry IOGP, Life Saving Rules have been incorporated into Safe Working Essentials. These Life Saving Rules support all elements and drive a consistent & simplified approach to the activities we undertake across the industry that have the potential to cause fatalities across the global industry.

The guidance can be used to support the use of the Safe Working Essentials by illustrating the background to Safe Working Essentials and outlining expectations of industry uptake.

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Background

All work tasks must be evaluated in order to identify the hazards and associated risks, identify the appropriate controls, recognise and understand the barriers and precautions required and to demonstrate that the risks have been reduced to As Low As Reasonably Practicable (ALARP).

The Management of Health and Safety at Work Regulations give details under the Health and Safety at Work Act which relate to the control of work activity and risk assessment. These regulations apply to all work places in the UK, including offshore installations.

Industry Need

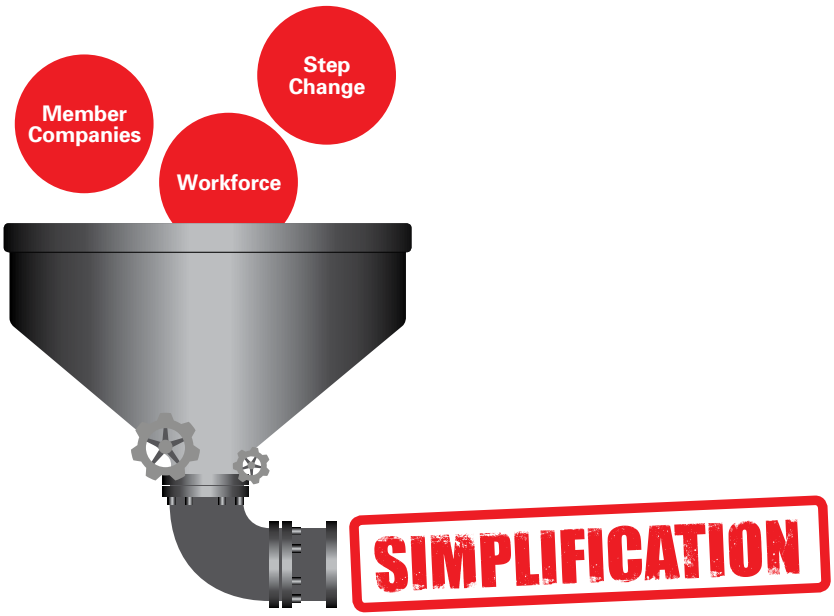
In 2006, Step Change in Safety launched a campaign called 'Boots on for Safety', which involved industry leaders visiting different offshore platforms and rigs in the Oil and Gas industry to listen to workforce views and ideas about safety. From this, a number of issues were identified as improvement opportunities, namely the need for common approaches to intervention systems, too much paperwork for people to get through before starting a job and that STOP cards are being used as a numbers game. Ten years later, these issues are still significant.

Step Change in Safety created a new work stream to progress these issues, called Simplification. Simplification is directly linked to deliverables from the Scottish Government and Energy Jobs Task Force, and is supported by Oil and Gas UK. The aim is to streamline work processes to make them simpler, more engaging and sustainable for all.

The intention is for Safe Working Essentials to be adopted throughout the whole UK Oil and Gas Industry.

During the '2018 Boots on for Safety' campaign a common theme emerged of how Simplification can be further adopted across the industry and this revision of Safe Working Essentials brings further opportunities to standardise across the industry.

There is a need to have a system in place to share information, as the diagram below shows;



Simplify, Engage, Sustain

Step Change in Safety led the introduction of MIST training through the introduction of the OPITO standard in 2009 and the programme is already central to Simplification, but its value can be further maximised through Safe Working Essentials.

Standardising and simplifying common elements such as toolbox talks, dynamic risk assessments and safety observation cards will allow a very rapid development and deployment of a standardised approach. Industry buy-in is critical.

Simplify

Simplification is a major step towards cost efficiency and collaboration. The objective is to standardise where possible, throughout the oil and gas sector. This will help to eradicate the confusion and complexity surrounding safety initiatives. It will also eliminate repetition, reduce costs, be more sustainable and, ultimately, help to keep the workforce safe.

Engage

A key aspect of Simplification is to allow the workforce to get on with their work quicker and in a safer manner. Simplification is a compelling argument for cost efficiency and collaboration. However, difficulties may arise between operators and contractors in choosing one system to use; all members have already invested time and money in their own systems. A gap analysis was therefore conducted to review all oil and gas operator and contractor in-house documents and identify any overlaps, identify key themes and therefore highlight good practice. The next sections outline the good practices that were consistently used by the industry.

Sustain

To sustain safe working essentials there will be a requirement for both operators and contractors to adopt the toolkit within their local control of work processes and share the lessons generated to feed into a continual improvement network industry wide.

Roles and Responsibilities

Organisation

The **organisation** should ensure that Safe Working Essentials is supported and endorsed by the leadership team. There is a requirement to make the tool available to all assets, sites and also within the supply chain.

Team

The **team** is responsible for collaboration and communication of the tool and to utilise it to support their day to day operations. As a team there is a requirement to encourage all members to both contribute and participate effectively to gain best use of the toolkit.

Individual

Individuals when using the tool should maintain a questioning attitude and call upon their situational awareness when performing tasks. The tool is designed to deliver feedback where required and the individual should seek this throughout the process.

Process Flow

Introduction

The elements for control of work are identified below and outlined in detail at the relevant sections in this guidance document. Fundamental to the use of Safe Working Essentials in the control of work process is preparation to ensure that from the outset all of the hazards, controls & mitigations have been identified.

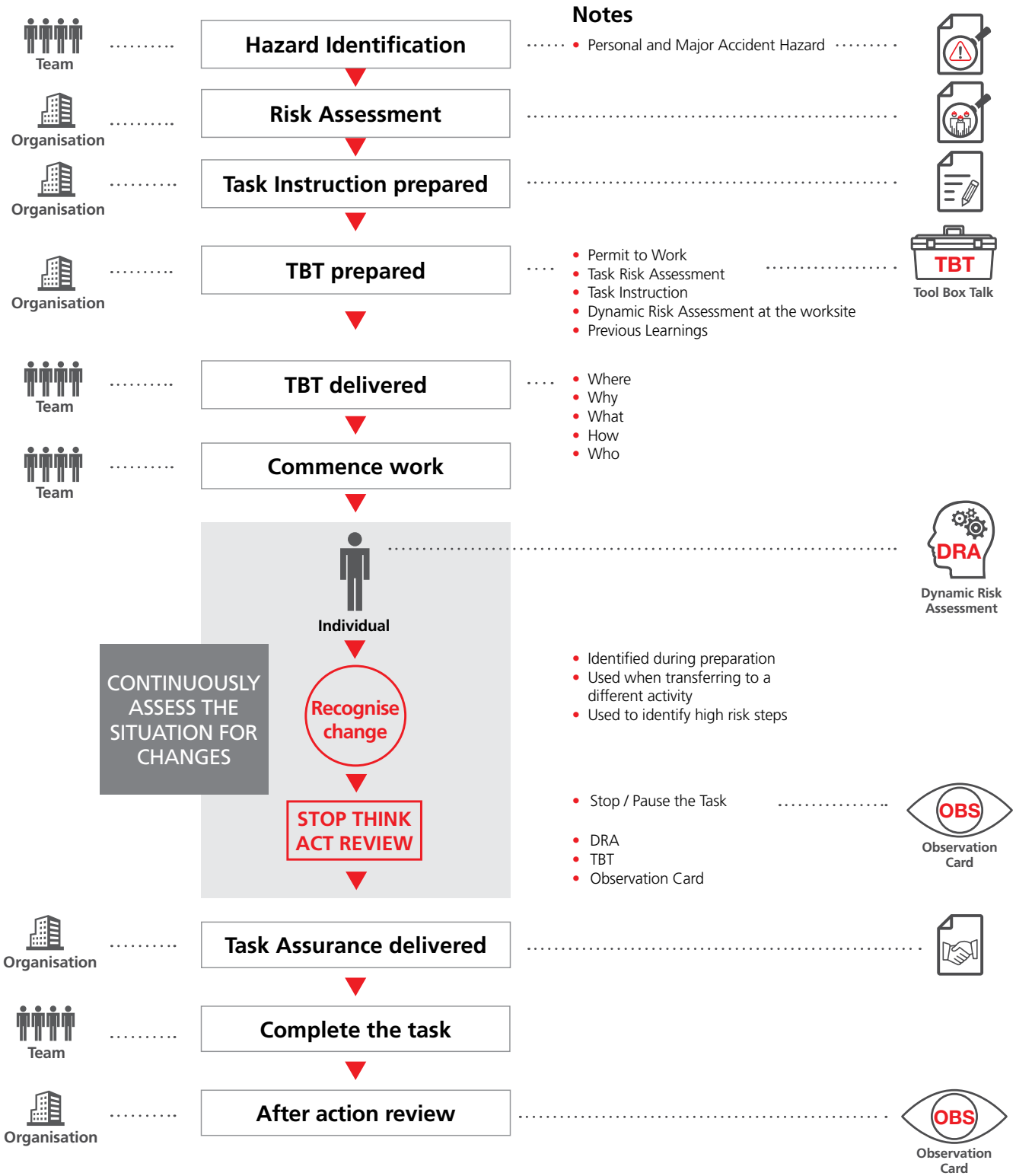


Figure 1 – Safe Working Essentials: Control of Work elements

Description

There are a number of steps to the completion of any task and for the effective delivery of control of work and completion of the task the following steps are key:

Hazard Identification – visit the worksite and identify the relevant hazards for the task, both personal and Major Accident potential.

Task Risk Assessment – after identifying the hazards review the mitigations and controls that are required to ensure that the risks associated with the task are reduced to As Low As Reasonably Practicable (ALARP).

Task Instruction – the way that the task is documented should be such that it considers the hazards, risks, controls and mitigations. It should be written so that it outlines not just what is required to be undertaken but also why.

TBT Prepared – review the organisation's control of work paperwork relevant for the task (permit to work, task risk assessment, job step plan) and identify those items required to be communicated via the TBT (Why, What, Who, Where, How, When). To aid the TBT leader in this task a TBT form has been developed allowing a structured approach to the preparation.

TBT Delivered – the delivery of the TBT should be completed in a manner that generates the following actions; engagement, listening, questioning, confirmation and ensures that the team contribute with; energy, concentration, commitment and understanding of the task. Key to the TBT is confirmation of understanding of all team members in their role and the requirement to stop the job if the situation changes at any time.

Commence Work – the team should commence work in line with the plan and ensure that the control measures outlined in the TBT are followed.

Recognition of Change – at all times throughout the task the team should be monitoring closely for any situation changes that may require the team to stop the task and review the impact of the change. A change could come in a variety of forms such as; weather, equipment not working as planned, fatigue of the team, a mistake made by a team member.

Stop, Think, Act, Review – as we recognise that a change has occurred the team should stop the activity and ensure that they think through the implications of the change in the task. The best method to complete this is to assess the risks via a Dynamic Risk Assessment. Once the risks have been assessed it may be that the task has to have further control measures. These should be communicated to the team as required prior to the task commencing.

Note: there may be occasions when the change is such that the task requires to be stopped and the task risk assessment amended to reflect the change. If the control measure is such that this does not require to be documented on the TRA then it is recommended that an Observation card is completed to allow for the learnings to be communicated.

Task Assurance – for tasks that present the potential for serious injury then a greater level of assurance can be achieved by Task Assurance involving a discussion with the work team about what they are doing, mitigations that are in place and why/ how they are doing it.

Complete the Task – once the task has been completed then the worksite should be left in accordance with the organisation's procedures. The team should also be made aware that an After Action Review will be undertaken.

After Action Review – the AAR allows the team the opportunity to review the task recently completed to identify any good practices and learnings that the team would recommend to the organisation. The AAR learnings should be communicated by using the Observation card to allow for the correct action.

Hierarchy of Control

Throughout the complete process, those preparing and executing the task should ensure that they minimise the risk to the workforce by applying the Hierarchy of Control. When reviewing the documentation to prepare for the task the control measures should be clearly reviewed to ensure that the teams **understand** them and do not deviate from the stated mitigations.

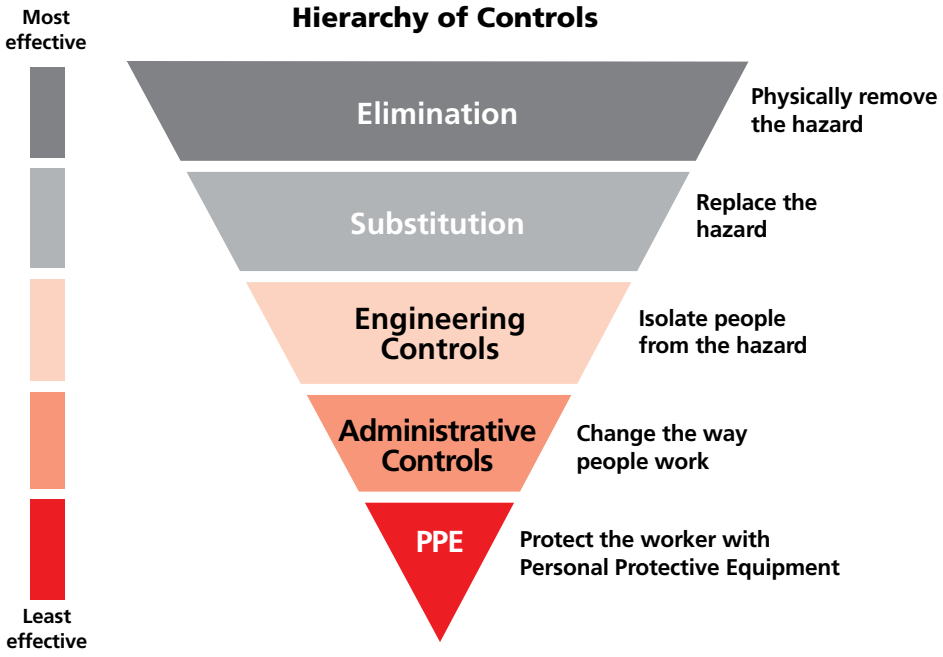


Figure 2 – The Hierarchy of Control

International Association of Oil & Gas Producers

LIFE-SAVING RULES

Bypassing Safety Controls

Obtain authorisation before overriding or disabling safety controls

- I understand and use safety-critical equipment and procedures which apply to my task
- I obtain authorisation before:
  - disabling or overriding safety equipment
  - deviating from procedures
  - crossing a barrier

Confined Space

Obtain authorisation before entering a confined space

- I confirm energy sources are isolated
- I confirm the atmosphere has been tested and is monitored
- I check and use my breathing apparatus when required
- I confirm there is an attendant standing by
- I confirm a rescue plan is in place
- I obtain authorisation to enter

Driving

Follow safe driving rules

- I always wear a seatbelt
- I do not exceed the speed limit, and reduce my speed for road conditions
- I do not use phones or operate devices while driving
- I am fit, rested and fully alert while driving
- I follow journey management requirements

Energy Isolation

Verify isolation and zero energy before work begins

- I have identified all energy sources
- I confirm that hazardous energy sources have been isolated, locked, and tagged
- I have checked there is zero energy and tested for residual or stored energy

Hot Work

Control flammables and ignition sources

- I identify and control ignition sources
- Before starting any hot work:
  - I confirm flammable material has been removed or isolated
  - I obtain authorisation
- Before starting hot work in a hazardous area I confirm:
  - a gas test has been completed
  - gas will be monitored continually

Line of Fire

Keep yourself and others out of the line of fire

- I position myself to avoid:
  - moving objects
  - vehicles
  - pressure releases
  - dropped objects
- I establish and obey barriers and exclusion zones
- I take action to secure loose objects and report potential dropped objects

Safe Mechanical Lifting

Plan lifting operations and control the area

- I confirm that the equipment and load have been inspected and are fit for purpose
- I only operate equipment that I am qualified to use
- I establish and obey barriers and exclusion zones
- I never walk under a suspended load

Work Authorisation

Work with a valid permit when required

- I have confirmed if a permit is required
- I am authorised to perform the work
- I understand the permit
- I have confirmed that hazards are controlled and it is safe to start
- I stop and reassess if conditions change

Working at Height

Protect yourself against a fall when working at height

- I inspect my fall protection equipment before use
- I secure tools and work materials to prevent dropped objects
- I tie off 100% to approved anchor points while outside a protected area

Hazard Identification

Introduction

One of the most important aspects of your risk assessment is accurately identifying the potential hazards in your workplace. A good starting point is to walk around your workplace and think about any hazards. In other words, what is it about the activities, processes or substances used that could injure your employees or harm their health. A hazard is defined as:

A condition or action that has the potential for an unplanned release of, or unwanted contact with, a workplace hazard that may result in harm or injury to people, property or the environment or has Major Accident Hazard potential.

Responsibilities

The responsibilities for Hazard Identification are;

Organisation

The identification of hazards requires knowledge and understanding of the task therefore the following factors should be considered:

When providing resource for the team, consider factors such as the complexity of the task, the location of the work and the size of the work group. In addition to the person doing the job, team members should be selected as appropriate and may include other workers, supervisors and HSE professionals. In some cases, it may be acceptable for hazard identification to be prepared by one person.

Adequate knowledge of the particular job (task) and the location where it will be performed are required for effective hazard identification. Other important behaviours are being supportive, non-judgmental, willing to listen to ideas and persistent in finding all hazards to bring about a safe workplace.

Hazard identification may be initiated in an office setting; however, site visits by the person(s) conducting the task are required to complete the hazard analysis.

Team

The identification of workplace hazards should be undertaken at or near the work site, identifying conditions that have the potential to cause harm.

Communication with other members of your team is important as they may spot something you have missed.

Individual

It is the responsibility of each individual to; Consider the task and the worksite when assessing for hazards as the task could be the same but the worksite could introduce additional hazards. If you are unsure or unfamiliar with hazards associated with the task or worksite ask. In addition, you may identify hazards which other members of your team are unaware of so ensure they are discussed and recorded.

When you work in a place everyday it is easy to overlook some hazards, so consider the following tips:

- Check manufacturers' instructions or data sheets for chemicals and equipment as they can be very helpful in spelling out the hazards and putting them in their true perspective
- Look at past accidents - these often help to identify the less obvious hazards
- Take account of non-routine operations (eg maintenance, cleaning operations or changes in production cycles)
- Remember to think about long-term hazards to health (eg high levels of noise or exposure to harmful substances)

Preparation

Hazard Identification should be prepared for by ensuring that those undertaking the process understand the workplace hazards that are present during the task. The workplace hazards are: Major Accident Hazards, Gravity, Motion, Mechanical, Electrical, Pressure, Temperature, Sound, Chemical, Radiation, Biological. Included in the hazard identification categories are: Environment, Safety Systems and Human Performance. A number of companies use these categories and they also link to good practice in process safety and major accident hazard awareness.

Communication

As part of the Hazard Identification process there should be regular communication between the team that are planning and undertaking the activity to ensure that all hazards are identified at this early stage.

Summary of the Hazard Identification

The hazards identified at this stage are incorporated into all other aspects of the control of work process to allow mitigations/ controls to be implemented. Key to Hazard Identification is that a worksite visit occurs and those actually doing the task are involved with the process.

Risk Assessment

Introduction

All activities with significant risk must be risk assessed to evaluate how hazards may cause harm and to identify appropriate controls in order to reduce the risk to As Low As Reasonably Practicable (ALARP).

Responsibilities

Organisation – the organisation must ensure a risk assessment process is in place and appropriately used.

Supervisor – the supervisor must ensure that each activity has been risk assessed and the assessment is up to date and relevant to the specific activities to be performed. The supervisor must communicate the results of the risk assessment to all the individuals involved in the activity as well as any others that may be affected by the activity.

Individual – the individual is responsible for raising any concerns they have, reviewing provided material and ensuring they understand their responsibilities.

Preparation

A risk assessment should be prepared by competent persons including personnel experienced in the operations which are to be risk assessed. Before the risk assessment takes place personnel reviewing it should be made familiar with the location and the task. The personnel who prepare and review the risk assessment should be recorded on the risk assessment form.

The risk assessment should be approved by the respective worksite manager or supervisor. The remaining fields should be complete so that anyone who reviews the risk assessment understands its context.

Task Steps – the tasks should be broken down into each step for the activity and the initial and residual risks considered for each chunk.

Hazards – for each task, hazards should be identified. A hazard is anything which can cause harm to people, the environment or damage to equipment. The hazards noted in the Hazard Identification card should be incorporated here. See page 10.

Risk Ranking – risk is the likelihood of the hazard occurring together with the consequence of the hazard. Each task and applicable hazard should be risk assessed using the organisation's risk matrix and risk assessment methodology, for example, does the organisation have standard mitigations and controls?

Controls/ Action required – detail the controls or actions taken to reduce the risk to ALARP. Controls should be identified in accordance with the hierarchy of control, see page 09. The greater the risk, the more robust the controls will need to be.

Responsible Person – is the person responsible for verifying the prerequisite controls or actions are in place prior to work commencing.

Controls in place? – has the responsible person verified the prerequisite controls or actions are in place?

Communication

The risk assessment should be communicated to and understood by the following:

- Worksite manager
- Supervisor
- Work team
- Rescue team/ standby person
- Anyone who is not involved in the task but could be impacted by the task or it's hazards

Regular Review

Risk assessments should be regularly reviewed to ensure they remain up to date and adjusted to suit the specific circumstances for the activities being assessed and the location where the work will be performed. As a minimum, risk assessments should be reviewed annually however, additional reviews may be required; such as in the case of the following examples;

- After any changes
- When additional hazards have been identified
- Any lessons learned from accidents or near misses
- Following feedback from observations cards

Each time a risk assessment has been amended it must be re-communicated.

Task Instruction

Introduction

A Task Instruction is an operational level document that outlines how a task should be undertaken. The purpose of the Task Instruction template within this document is to go beyond a list of what needs to be completed and look at how the task should be undertaken and why the measures/ mitigations are in place. A Task Instruction is also known as a; Job Step Plan, operational level procedure, Operating Instruction and relates to how work is completed on an asset as opposed to a company level guidance document. A Task Instruction could be a simple task or complex task. The form has the ability to be used across a wide variety of tasks. The Task Instruction template is shown at Appendix 05.

Responsibilities

The responsibilities for the development and issue of a Task Instruction are listed below.

Organisation – the organisation is responsible for ensuring that sufficient time is allocated to allow a Task Instruction to be written and suitable tools for identifying hazards associated with the steps within the task.

Team – the team are responsible for the development of the Task Instruction. The development of the Task Instruction is outlined below. Key to the development of a Task Instruction is to ensure that the correct people are involved with the task. For instance if it is a complex lifting task it will be useful to have the LOLER focal point/technical authority involved.

Individual – it is the responsibility of each individual to follow the steps within the Task Instruction and ensure that a suitable Toolbox Talk is held prior to the commencement of work and also at appropriate intervals during the task.

Preparation

The Task Instruction should be prepared by suitably competent persons who have an awareness/ understanding of the task to be undertaken. The Task Instruction format uses 3 levels for the completion of the document, namely:

Task – This is the highest level and this section of the document allows for a high level overview of the task. This overview includes; task description, resources and location.

Activity – To allow for human performance to be sustained, the task is broken down into activities. An example of this would be: Task – Replace valve, Activities – Apply Isolations, Lift Valve, Refit Valve, Remove Isolations. By establishing Activities within the Task this allows for 'chunking' of the task and easier identification of critical steps that may require additional verification.

Steps – Within each activity there are a number of steps that provide the level of detail required to complete the task in a safe and efficient manner. The steps provide the; what, why and how in a detailed format. Part of the writing of this stage of the Task Instruction is to identify how the criticality of the step aligns with the hazard identification and risk assessment process. By the use of colour, the Step part of the Task Instruction gives a visual prompt of the critical nature. This will allow the person/ team writing the task instruction to look at putting in place a hold point for any assurance activity that may be required prior to proceeding. An example would be when undertaking a break of containment this could be coloured 'red' to indicate that there are a number of mitigations that should be in place and verified prior to breaking a joint.

A task analysis is undertaken by discussing the Task Instruction with suitable people, ideally the team will be made up from both those planning the task and those that will actually complete the task. Examples include:

- Operations representatives with knowledge of how the task is undertaken;
- Project engineers if it is a project-based task;
- Technical safety.

Firstly, the team must identify the high-level aspects of the task, namely:

- The overall task goal;
- The scope of the task including the preconditions; and any Life Saving Rules that are applicable
- The main activities and steps for the task overall goal;
- The main objective is to determine if enough detail is included so that a trained/ competent, but inexperienced operator could complete the task safely.

By identifying the Activities and the subsequent steps a detailed task analysis can be undertaken. The team should record information which helps others to develop a common understanding of how the task is undertaken. This may include:

- Communication of how, why & what;
- Tools and equipment;
- Roles involved;
- Location of task;
- Relevant working conditions which may affect performance;
- Any additional verification that may be required;
- Previous learnings from successes/ failures;
- Performance criteria (what should be achieved).

Communication

Once the analysis of the task has been completed the Task Instruction should be written using clear language and avoiding the use of acronyms. Remember that the task should be able to be completed by a trained/ competent yet inexperienced person.

The Task Instruction can be used as the starting point for the Toolbox Talk since it should provide all the detail required to outline the Toolbox Talk headings whilst ensuring that all hazards identified during the planning stage are discussed and mitigations implemented.

Summary of the Task Instruction

The Task Instruction format allows for a logical progression through a task by breaking the task down into activities and then developing steps to complete each activity. A good Task Instruction will bring together the planning aspects of Safe Working Essentials into one document so that those about to execute a task understand;

- What the task is & why it is being completed;
- What resources are required (people, equipment, time, spares);
- How the task should be undertaken;
- What the hazards are;
- What mitigations are required at the various steps of the task;
- Why the mitigations are required.

Toolbox Talks

Introduction

There are many Tool Box Talks held every day, some better than others. There are numerous different TBT formats with different processes and different terminology. The differences are generally minor in nature as the TBT process is essentially similar.

A Step Change in Safety work group reviewed what was available across industry and have developed this guide based on best practice. A common TBT process will help achieve the Step Change in Safety goal of Focused Standardisation and simplification across the UK oil and gas industry, which is considered essential to further improving safety performance and efficiency.

This guide is intended to help you, and everyone else across the industry, to deliver better Tool Box Talks.

Responsibilities

The Duty Holder has overall accountability for safety at your facility and as such, is responsible for organising Task Risk Assessments (TRA) and Permits To Work (PTW) in accordance with the established company processes. You may have been involved in planning and preparing for the work and this is always good practice. Once assigned to perform the work your first duty is to prepare for the TBT.

Preparation

The TBT Guide included in the Safe Working Essentials tool kit is designed to help ensure you don't overlook any aspect of preparing and delivering the TBT.

Use the form to make notes to help you deliver a better TBT to your team.

Prompts

The Safe Working Essentials TBT form has prompts to help you remember everything you need to know to deliver effectively. The more you refer to these the sooner you will find the process becomes second nature. Even when you know this process well it is still useful to refer to the prompts to allow your mind to focus on the task, the associated hazards and the controls required to ensure the task continues safely.

Communication

The TBT is always delivered before the task begins though may be repeated in all or in part when a new person joins the team and also at the start of each shift to refresh understanding and talk through the next steps of the task.

It seems obvious but a TBT is primarily about communication. A good TBT involves a lot more than just talking. Details of how to communicate well, while delivering a TBT are provided on page 19, in 'How to deliver your TBT'.

Film

There is a Step Change in Safety Tool Box Talk film available which shows good delivery practice in support of this guide.

Preparation

The first step is to review all of the documentation that will support and control the work. This could include:

- Risk assessments
- Permit and certificates
- Work order
- Drawings and technical instructions

Understand the task

All tasks are easiest to understand when broken down into steps. It is useful to identify when the task should be paused to update the team on the next steps and confirm responsibilities. This is especially important when approaching potentially higher risk aspects of the task. Key pauses between steps are often called 'hold points'. These are also excellent opportunities to do a Dynamic Risk Assesment (DRA).

A comprehensive understanding of the task is essential before moving on to the next step.

Be able to explain the task to your team.

You need to be able to explain what is involved in the task, where it will be performed, when the hold points are, and who has the key responsibilities for which parts of the task.

Visit the workplace

The next step is very important and the most often missed out. Going to see where the task will be done.

Physically going to the workplace allows you to see how the TRA and PTW controls will be used in the environment where the task will be done. There may be other tasks being performed nearby, above or below, and weather could be an issue. This is also your first opportunity to do a DRA to support the task preparation work already completed.

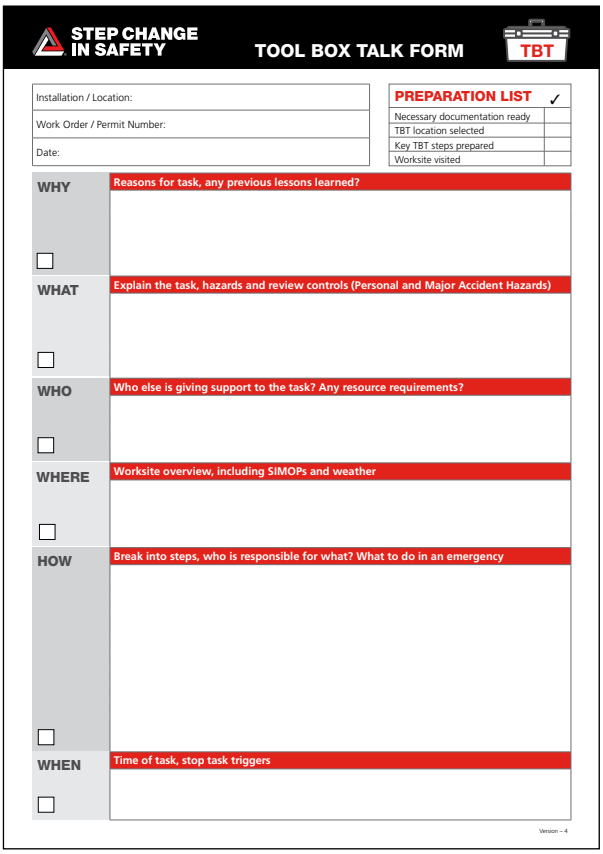
Decide where to deliver the TBT

The best place to deliver the TBT is the work place though only if conditions are suitable. Where the work place has high noise, poor lighting, or is likely to be affected by poor weather conditions then a more suitable location for the TBT needs to be found.

This needs to be communicated to your work team in plenty of time as they too may need to prepare for the TBT.

What to include in your TBT

You can use the TBT form to make notes so you make sure you don't overlook any aspect during your delivery. You have enough to remember without trying to memorise every step in this process and your team may well have questions and the form will help keep you focused.



STEP CHANGE IN SAFETY

TOOL BOX TALK FORM

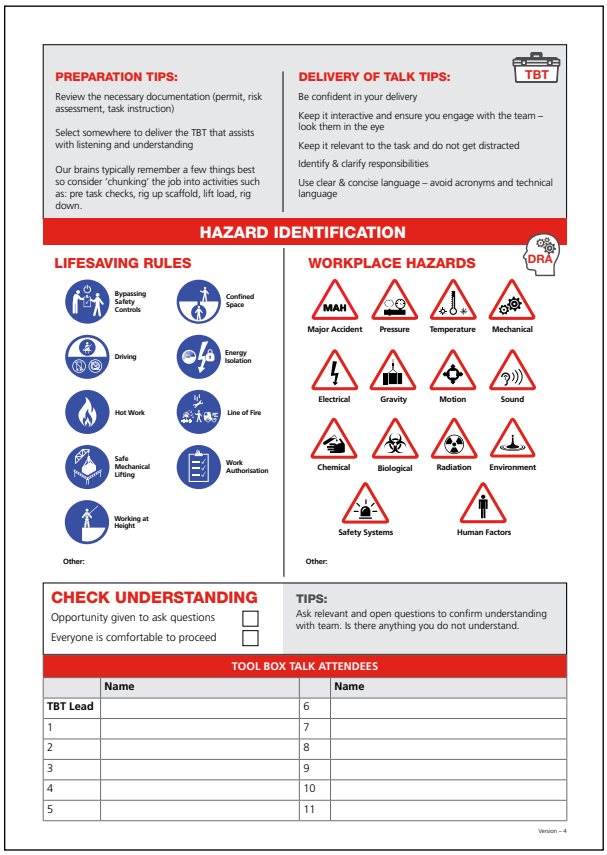
TBT

Installation / Location:	
Work Order / Permit Number:	
Date:	

PREPARATION LIST	✓
Necessary documentation ready	
TBT location selected	
Key TBT steps prepared	
Worksite visited	

WHY ☐	Reasons for task, any previous lessons learned?
WHAT ☐	Explain the task, hazards and review controls (Personal and Major Accident Hazards)
WHO ☐	Who else is giving support to the task? Any resource requirements?
WHERE ☐	Worksite overview, including SIMOPs and weather
HOW ☐	Break into steps, who is responsible for what? What to do in an emergency
WHEN ☐	Time of task, stop task triggers

Version – 4



PREPARATION TIPS:

Review the necessary documentation (permit, risk assessment, task instruction)

Select somewhere to deliver the TBT that assists with listening and understanding

Our brains typically remember a few things best so consider 'chunking' the job into activities such as: pre task checks, rig up scaffold, lift load, rig down.

DELIVERY OF TALK TIPS:

TBT

Be confident in your delivery

Keep it interactive and ensure you engage with the team – look them in the eye

Keep it relevant to the task and do not get distracted

Identify & clarify responsibilities

Use clear & concise language – avoid acronyms and technical language

HAZARD IDENTIFICATION

LIFESAVING RULES

Bypassing Safety Controls; Confined Space; Driving; Energy Isolation; Hot Work; Line of Fire; Safe Mechanical Lifting; Work Authorisation; Working at Height

Other:

WORKPLACE HAZARDS

DRA

MAH; Major Accident; Pressure; Temperature; Mechanical; Electrical; Gravity; Motion; Sound; Chemical; Biological; Radiation; Environment; Safety Systems; Human Factors

Other:

CHECK UNDERSTANDING

Opportunity given to ask questions ☐

Everyone is comfortable to proceed ☐

TIPS:

Ask relevant and open questions to confirm understanding with team. Is there anything you do not understand.

TOOL BOX TALK ATTENDEES

	Name		Name
TBT Lead		6	
1		7	
2		8	
3		9	
4		10	
5		11	

Version – 4

At the top of the front page of the form there are boxes for reference purposes:

- Installation
- Date
- Work Order
- Permit number

The next 6 sections cover the following areas, and asks for the following information to structure the TBT:

- **WHY** – Reasons for the task, any previous lessons learned?
- **WHAT** – Overview of the task and hazards (Personal and Major Accident Hazards)
- **WHO** – Who else is supporting the activity? Any resource requirements?
- **WHERE** – Worksite overview, including SIMOPS and weather
- **HOW** – Break into steps, agree hold points, who is responsible for what?
- **WHEN** – Time of job, stop job triggers

On the back of the page are three checklists with associated tips covering:

- Preparation
- Delivery of Talk
- Check Understanding

This information supports the flow of the TBT guide in the tool.

The last section gives room for the TBT Leader and the workparty to add their names to confirm attendance, and requires filling in by those present.

How to deliver your TBT

✓ **ENGAGE**

Anyone can stand and talk, and some people are more comfortable than others talking to groups of people. To effectively deliver a TBT you have to engage the others in your team. To do this you need to communicate well with each one of them and this requires eye contact. If you don't look at each person and make frequent eye contact you aren't communicating as well as you could be. This is a skill and so the more you practice this the better you will become at it.

Good communication also requires energy from you and from the people in your team. Be positive, you already fully understand the task, you have visited the work place, and you are both confident and comfortable explaining the task to those present at your TBT. If you keep your energy levels up this will be evident to your team and they will be inclined to respond positively to this and add their energy.

✓ **LISTEN**

Everyone present must listen to what is being said. Listening isn't just hearing, it's being able to explain back what has been heard and demonstrate understanding of the message, not just the words.

Listening requires concentration so avoid distractions and control interruptions.

✓ **QUESTION**

You need to ask people questions to give them the opportunity to demonstrate their understanding. A good TBT ensures everyone present talks at some point. Questions ensure that those amongst us that are perhaps more reserved or quiet by nature also have the opportunity to speak and to demonstrate understanding. Just because someone is naturally quiet shouldn't mean they don't get their turn to speak.

When someone asks a valid question this demonstrates their commitment to wanting to fully understand their elements of the task. Every good question should be acknowledged as such and people do appreciate being thanked for asking good questions.

✓ **CONFIRM**

If your TBT has gone well you will have ensured good communication, have checked for active listening and had many questions that demonstrate your team understand the task and all it involves. The last step in the TBT is to confirm with everyone present that they understand the task and to ask if they are comfortable to proceed?

Once this is confirmed you can enter your name on the TBT form and ask everyone else present to do the same.

You are now ready to start the task.

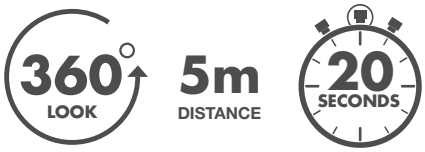
Dynamic Risk Assessment

Dynamic Risk Assessment (DRA) refers to the continuous assessment of risks arising from potential hazards (Personal and Major Accident Hazard), in the ongoing and changing circumstances of work activities. For example, changes in weather conditions or realising that a critical piece of equipment is missing. This ongoing assessment is a necessary part of safe working in order for appropriate control measures to be implemented, thus reducing risks to As Low As Reasonably Practicable (ALARP).

The benefits of proceeding with a task must be weighed against the risks. This means ongoing assessment of what may have changed in the situation and stopping to think before taking action. This can be summarised by Stop, Think, Act, Review (see below).

STOP	• Use senses to look for hazards • Use prompts to review hazards • Has the situation changed?		DATA GATHERING
THINK	• Use your experience to evaluate the situation • Could you or your colleagues get hurt? • What can you do about it? • Evaluate options based upon reducing risk		PROCESS THE DATA INTO INFORMATION
ACT	• Add additional control measures • Recommence the activity • Generate Observation Card for sharing of learnings		APPLY THE INFORMATION INTELLIGENTLY
REVIEW	• Complete task after action review • Reassess systems of work		ASSESS, ADAPT & LEARN

In order to do this, it is necessary to maintain situational awareness. This involves using all Senses (sight, hearing, smell) (or observe), to receive information from the environment around you. The next stage is to orient by considering prior experiences or other people's experiences and the impact these could have on you and/ or others. The next stage is deciding on the course of action to take based on the best possible outcome of the action. The final stage is to take action to improve the situation, thus keeping risks ALARP.



The diagram below recommends that situational awareness can be maintained by conducting a 360 degree appraisal in the area up to 5 meters away from you but remember to use ALL your senses as the threat or hazard may come from further away, e.g. a crew preparing for lifting operations in the near vicinity.

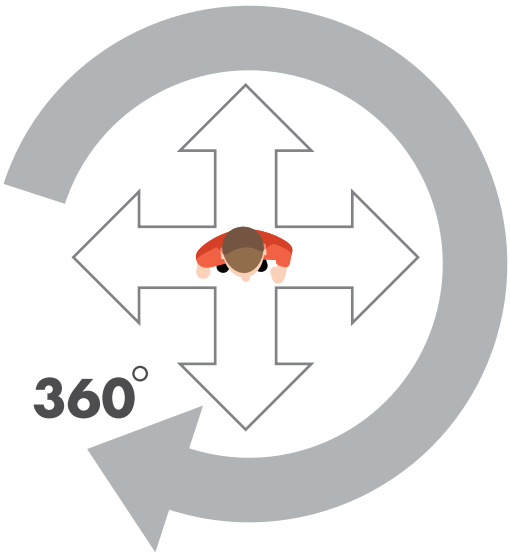


Figure 3 – 360 degree appraisal

A number of additional factors might contribute to the current course of action being too risky, so it is important to recognise any changes to the situation. For example, new hazards and their risks might arise or existing hazards may present different risks. Operational activities might change requiring reactive rather than proactive decision making and signs of fatigue in personnel should be monitored and addressed.

It is important to never be complacent about risks, as they will always exist and sometimes show up in unanticipated ways. Taking risks does not always end up in gaining benefits. If the unanticipated does happen, then gather information for an After Action Review and debrief. The safety observation card or the After Action Review form can be used for this. Recording instances of unsafe acts and unsafe conditions is important for learning lessons that can be shared with the wider industry.

Observation Card

Introduction

The observation card (OBS) has a logical place in the suite of work site tools, fully complementing TBT and DRA. As part of the standardisation process, the OBS card has been produced from the good practice found in many of the industry observation systems. The OBS card links all the elements of the tool suite together and can be used to record any change resulting from a DRA, AAR or any other observed unsafe act or condition, e.g. a cable lying across a walkway.

The most important aspect of any observation system is to identify and deal with any issue and then record it for further analysis in order to learn lessons. The most common complaint with observation systems is that the contributor does not receive feedback. The Safe Working OBS card closes the loop and requires that feedback be given. This enables recognition of both positive and negative observations and ensures that the learning process is sustained throughout the industry.

Responsibilities

Organisation: the organisation should ensure that the OBS cards are available to everyone and are used by all companies (duty holder, contractors, supply chain) on an offshore installation or onshore location. It should provide a system to collect the cards and ensure that the cards are reviewed and appropriate feedback given.

Team: the team should encourage colleagues to use the OBS cards and review any cards submitted at the AAR stage, to identify any lessons learned that could improve how tasks are conducted in the future.

Individual: the individual is responsible for recording observations, any changes and actions arising, to submit to the organisation's system in a timely manner.

Preparation/ Use

Front Page: the front page of the OBS card asks for details such as name (required for individual feedback), location, date/ time and what category of event has been observed and is being recorded, i.e. safe/ unsafe act or safe/ unsafe condition. The next section asks what the individual has observed (i.e. the event or situation) or what change has been recognised. The following section asks what the individual has done about it – how was the situation or event dealt with and who was told about it? The final section asks what the team should do about it. There is an opportunity here for the team to record what could be done to prevent this event/ situation happening again, for example by changing how the task is planned and executed.

Back Page: the back page is where feedback is given. For the individual, this could range from verbal thanks and acknowledgement of the OBS card, or further discussion to explore the observation as part of the After Action Review. For the team, this is the opportunity to give feedback on any observations or change management. Finally, for the organisation, the feedback is at a high level and related to any alerts or changes to procedures.

Check boxes for Feedback are given along with any reference number, so that changes can be tracked within an installation, site or organisation's system.

OBSERVATION CARD

Name:

Location:

Date/Time:

Company:

Type of observation (please tick)

☐ Conversation ☐ Safe ☐ Act/Behaviour

☐ Observation ☐ Unsafe ☐ Condition/Consequence

WHAT DID YOU OBSERVE OR WHAT CHANGED?

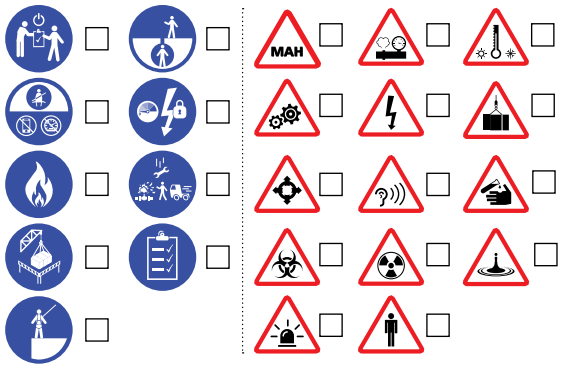
WHAT DID YOU DO ABOUT IT?

Did you stop the job? ☐ Yes ☐ No

WHAT COULD WE DO ABOUT IT?

INDIVIDUAL/TEAM/ORGANISATION FEEDBACK

HAZARD(S) IDENTIFIED (MARK AS IDENTIFIED)



Other:

Feedback given? ☐ Yes ☐ No

Reference:

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Task Assurance

Introduction

Task Assurance is a planned and proactive activity of undertaking assurance checks before or during a task. This activity is a two-way process, between the team doing the work and the verifier. This allows the verifier to ensure that the task is being carried out safe and as planned but also gives the team the opportunity to highlight any issues and demonstrate any good practice. Task Assurance allows a set of 'fresh eyes' to visit the worksite and have a conversation directly with the team allowing immediate feedback. The verifier may be anyone deemed able to conduct a Task Assurance. Examples include: supervisor, subject matter expert, elected safety representatives.

Responsibilities

The responsibilities for a Task Assurance are:

Organisation – the organisation should ensure that there is sufficient time in the plan to allow for Task Assurance activities and that there is a culture of welcoming the Task Assurances as part of everyday activity. The organisation should also establish the promotion of findings from Task Assurance as a positive and recognise/ reward as appropriate.

Team – the team are responsible for accepting the Task Assurance process into their tasks.

Individual – it is the responsibility of each individual to engage in an honest and open manner throughout the verification. The verifier has an individual responsibility to ensure they are suitably prepared for the Task Assurance by ensuring they have an overview of the activity and some of the key mitigations that are required to be in place.

Process

A Task Assurance can be targeted at high risk activity (ie one of the Life Saving Rules), as identified during the risk assessment process. This allows the verifier and the team the opportunity to discuss the minimum expectations that must be in place. The task assurance allows for a proactive, deeper review of the activity across a number of areas as show below. These areas include: Major Accident Hazards, Process Safety, Human Performance and reliability.

When completing a Task Assurance the following are areas to consider or discussion/ confirmation at the worksite are:

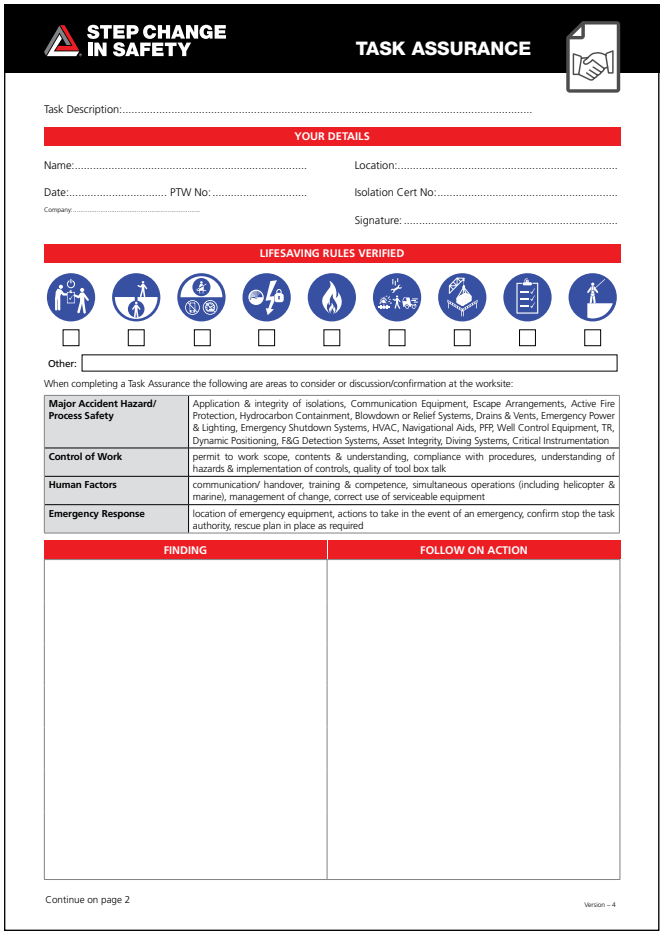
Major Accident Potential/ Process Safety	application & integrity of isolations, integrity of HP/LP interfaces, control of temporary equipment, integrity of process safety barriers and any local impairments, hydrocarbon containment
Control of Work	permit to work scope, contents & understanding, compliance with procedures, understanding of hazards & implementation of controls, quality of tool box talk
Human Performance	communication/ handover, training & competence, simultaneous operations (including helicopter & marine), management of change, correct use of serviceable equipment
Emergency Response	location of emergency equipment, actions to take in the event of an emergency, confirm stop the task authority, rescue plan in place as required

SAFE WORKING ESSENTIALS
GUIDANCE DOCUMENT

The assurance process should be an end to end approach, covering the planning and execution of the task. It can be used to provide assurance/ authority to start work as well as provide assurances throughout the task. As someone completing the assurance you must have satisfied yourself that the policies and procedures governing the task comply with legislative and company requirements. Use open ended questions (Why, What, How, When) and satisfy yourself that the personnel involved in the task understand the 'why' & 'how' behind the 'what'. Findings from the Task Assurance should be encouraged to maximise learning. The recommended Task Assurance process is:

Planning – Task Assurance identified at the previous day's planning meeting and assigned to suitable person (Supervisor, Subject Matter Expert, Elected Safety Representative) [Note: Task Assurance could be applied to a certain step within the task to provide assurances prior to the step being enacted such as prior to breaking of containment when a Task Assurance can be carried out that has an isolation focus].

Preparation – Prior to the Task Assurance the verifier should acquaint themselves with the relevant work scope and the key requirements/ mitigations. If the Task Assurance links to a Life Saving Rule then it is useful to review the minimum expectations of the Life Saving Rule.



STEP CHANGE IN SAFETY

TASK ASSURANCE

Task Description:.....

YOUR DETAILS

Name:..... Location:.....

Date:..... PTW No:..... Isolation Cert No:.....

Company:..... Signature:.....

LIFESAVING RULES VERIFIED

Other:

When completing a Task Assurance the following are areas to consider or discussion/confirmation at the worksite:

Major Accident Hazard/ Process Safety	Application & integrity of isolations, Communication Equipment, Escape Arrangements, Active Fire Protection, Hydrocarbon Containment, Blowdown or Relief Systems, Drains & Vents, Emergency Power & Lighting, Emergency Shutdown Systems, HVAC, Navigational Aids, PFP, Well Control Equipment, TR, Dynamic Positioning, F&G Detection Systems, Asset Integrity, Diving Systems, Critical Instrumentation
Control of Work	permit to work scope, contents & understanding, compliance with procedures, understanding of hazards & implementation of controls, quality of tool box talk
Human Factors	communication/ handover, training & competence, simultaneous operations (including helicopter & marine), management of change, correct use of serviceable equipment
Emergency Response	location of emergency equipment, actions to take in the event of an emergency, confirm stop the task authority, rescue plan in place as required

FINDING	FOLLOW ON ACTION

Continue on page 2

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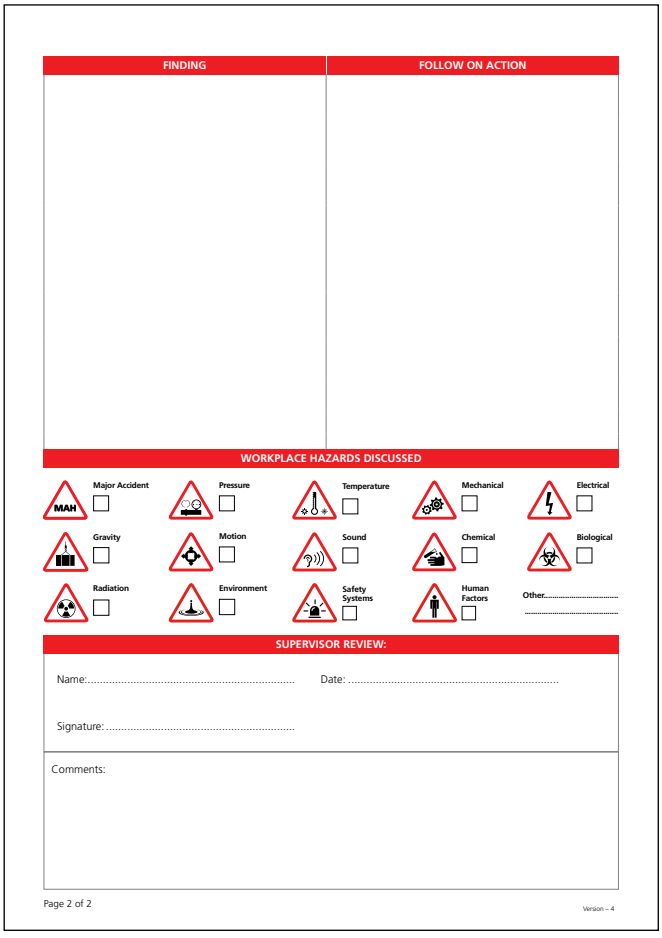

FINDING	FOLLOW ON ACTION

WORKPLACE HAZARDS DISCUSSED

Major Accident (MAH) ☐ Pressure ☐ Temperature ☐ Mechanical ☐ Electrical ☐

Gravity ☐ Motion ☐ Sound ☐ Chemical ☐ Biological ☐

Radiation ☐ Environment ☐ Safety Systems ☐ Human Factors ☐ Other.....

SUPERVISOR REVIEW:

Name:..... Date:.....

Signature:.....

Comments:

Page 2 of 2

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The front of the Task Assurance sheet is broken down into 5 sections. The first section asks for a description of the task, the second allows the verifier details to be entered and any relevant cross reference numbers (permit, isolation certificate).

The third section allows for the Life Saving Rule relevance to be annotated via the tick boxes. The fourth section provides some guidance for the verifier for areas that could be looked at as part of the Task Assurance. The fifth section provides space for the verifier to write what they found and any follow-on action.

The back of the form has 3 sections. The first section is a continuation of the findings and follow on action shown on the front page. The second section allows the verifier to annotate what workplace hazards were discussed during the verification and the final section provides space for a supervisory review of the verification.

Delivery – Task Assurance is undertaken at the worksite with the relevant team members [Note: the conversation throughout the Task Assurance should be; open, honest, respectful and based upon trust]. Throughout the Task Assurance the conversation is used to ensure that the mitigations/ minimum expectations are in place and that the team can identify these. It is not an audit and should be treated as an opportunity for the team to describe the task they are doing and how they are ensuring optimal performance levels. The form shown at Appendix 08 should be completed at the end of the Task Assurance and passed to the relevant supervisor for review and discussion with the supervisory team on the asset [Note: It is good practice not to complete the Task Assurance form during the verification since it can stifle the flow of conversation].

Output – A good Task Assurance will identify that work is being completed as per plan, however there will be occasions when the conversation identifies a finding. The act of finding something to learn from should be treated as a positive since it allows the team to put in place something to build further reliability into the task. In the same manner as a near miss a Task Assurance finding allows us to learn from finding things across; Major Accident Hazards, Process Safety, Occupational Safety, Environment and Reliability before a consequence is materialised (we got it before it got us).

Communication

The Task Assurance communication should be; engaging, energetic and allow reflection of the task. Tips for a good Task Assurance:

- In the same manner we communicate for the Toolbox Talk, the verifier and team should; Engage, Question and Listen;
- Use 'Open Ended' question technique [Note: These questions start with; How, Why, What, When];
- The verifier should ensure that they actively listen to the conversation and confirm understanding by the use of follow on questions;
- Do not avoid a difficult question and have the courage to ask it to ensure that as a verifier you can walk away from the task with confidence that the minimum expectations are in place;
- Findings should be encouraged and rewarded as deemed suitable;
- Preparation is key and the verifier should ensure that the minimum expectations of the task are been implemented.

Summary of the Task Assurance

A Task Assurance is an ideal opportunity to hold a planned and proactive conversation and allows for the minimum expectations to be verified whilst also providing a platform to identify findings that provide learnings to sustain/ improve performance.

After Action Review

Introduction

An After Action Review (AAR) is a structured method of reviewing how a task has been planned and executed. It focuses on the same headings mentioned in the tool box talk (Why, What, Who, Where, How & When) to review from the task participant's perspective what went well or could have been planned/ executed better. The application of an AAR allows for learnings to be identified and shared across an organisation to improve both safety and performance.

The AAR focus on the intended results versus the actual results achieved allowing individual input from experience during the task.

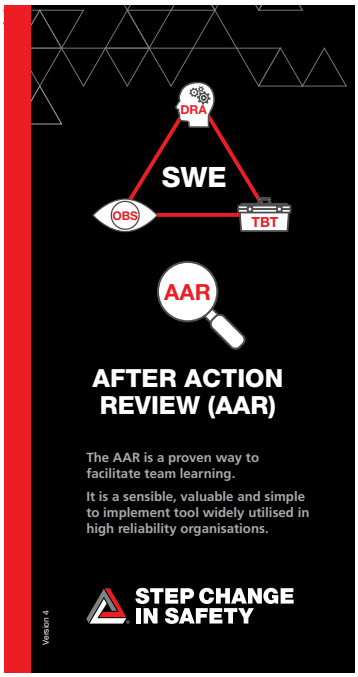
Responsibilities

The responsibilities for an After Action Review vary dependent on the type of AAR (formal or informal). A formal AAR is designed to be held at an organisational level and tends to focus more on major projects/ activities in relation to gathering learnings for knowledge sharing across future projects/ activities. An informal AAR is more appropriate at a team level and is a less time consuming approach while still ensuring that learnings are captured.

Organisation – the organisation is responsible for providing a mechanism for any lessons learned to be shared in a manner that is sustainable. The organisation should support the AAR process and empower team leaders to feedback results at the end of relevant tasks by ensuring that time is allocated in the planning process.

Team – the team are responsible for ensuring that they complete an AAR and feedback any lesson learned by the use of the observation card. The team leader in particular has a pivotal role in ensuring that all members of the team are engaged in the process and the necessary feedback is given prior to moving onto the next task.

Individual – it is the responsibility of each individual to ensure that they engage in the AAR process to identify learnings from the task that has been undertaken. These learnings if dealt with appropriately, can give future improvements in safety & performance for other similar tasks.



Preparation

The AAR should be prepared for by ensuring a suitable place to review the task that has been undertaken. A good starting point would be to review the Tool Box Talk that was completed at the start of the task and follow this through ensuring that each of the team contributes as required using the questions outlined below.

Communication

As part of the AAR the communication should be; engaging, energetic, reflective of the task undertaken and allow others involved with the task to ask questions. Some of the steps/ questions you may wish to consider are:

- What was supposed to happen?
- What did happen?
- What are the improvements?
- What are the good practices?

Summary of the AAR

Once the AAR is complete then any observations should be entered onto the Observation Card or AAR form to ensure that learnings are passed to the organisation.

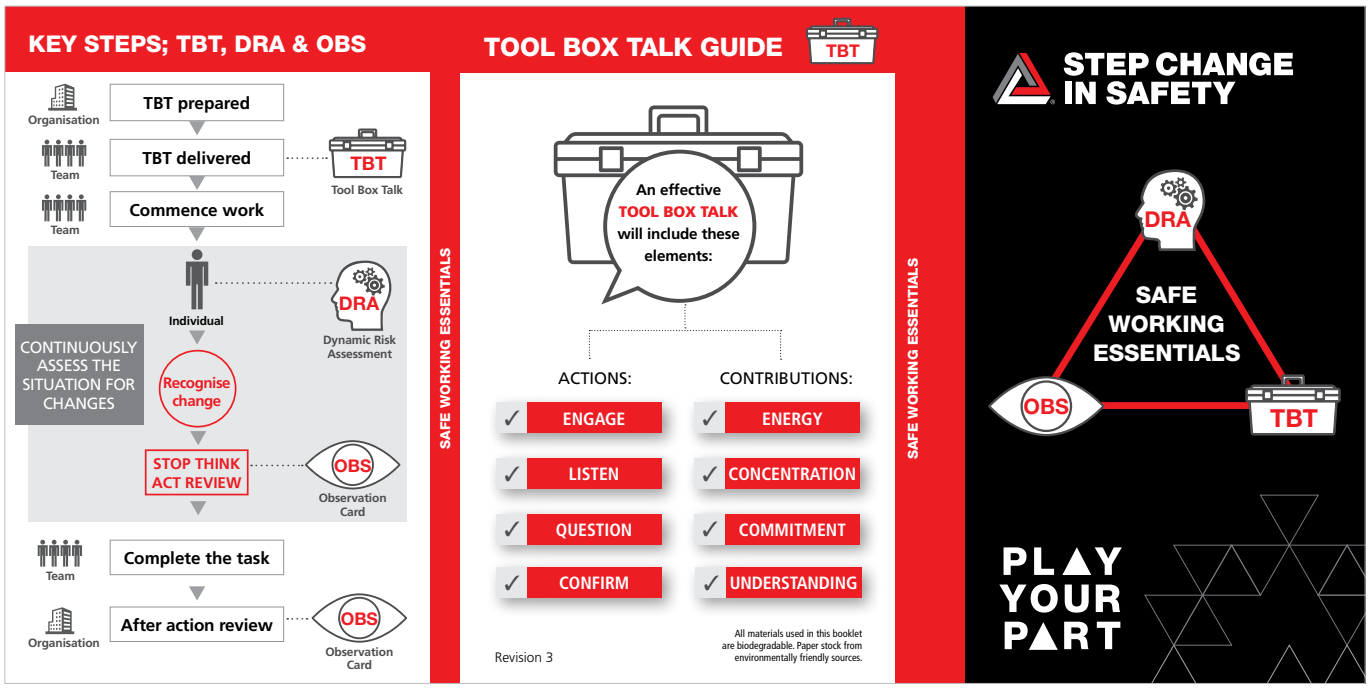
Appendices

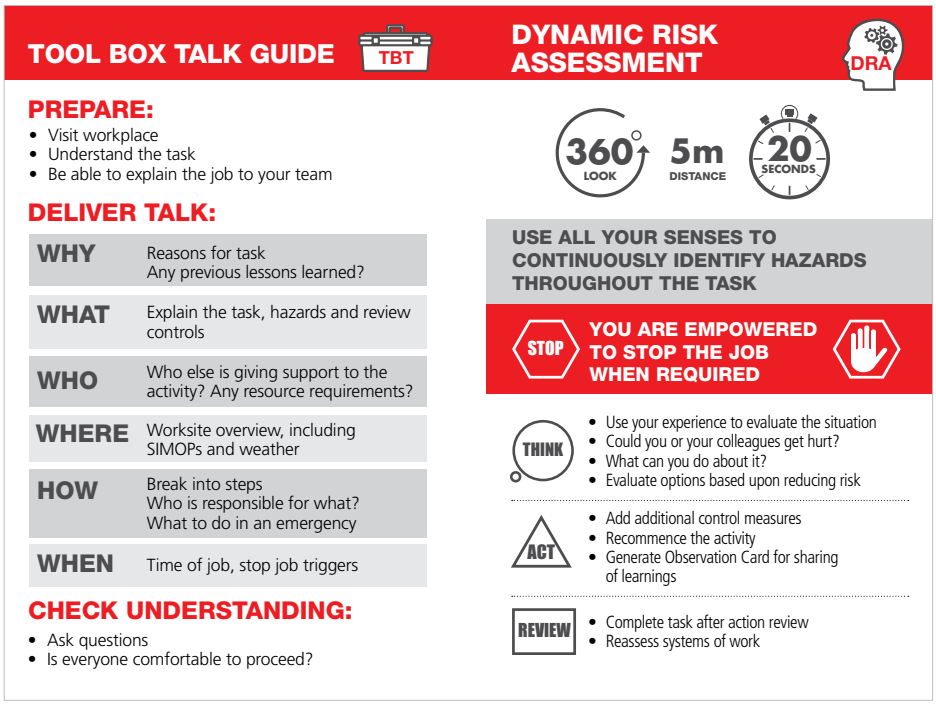
Appendix 1; Acronyms & Definitions

AAR	After Action Review
ALARP	As Low As Reasonably Practicable
DRA	Dynamic Risk Assessment
MIST	Minimum Industry Safety Training
OBS	Observation
OPITO	Offshore Petroleum Industry Training Organisation
PTW	Permit to Work
SIMOPS	Simultaneous Operations
SWE	Safe Working Essentials
TBT	Toolbox Talk
TRA	Task Risk Assessment

Appendix 2;

Safe Working Essentials booklet





Appendix 3;

Hazard Identification Form

STEP CHANGE IN SAFETY

HAZARD IDENTIFICATION

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Other: ☐

DESCRIPTION OF TASK

MAH Major Accident ☐	Pressure ☐	Temperature ☐	Mechanical ☐	Electrical ☐
Gravity ☐	Motion ☐	Sound ☐	Chemical ☐	Biological ☐
Radiation ☐	Environment ☐	Safety Systems ☐	Human Factors ☐	Other:

HAZARD(S) IDENTIFIED (PERSONAL AND MAJOR ACCIDENT HAZARDS)

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Hazard Identification Form

✓	MAJOR ACCIDENT HAZARDS	
	The potential of a Major Accident is not a standalone subject and runs through everything we do. Highlighted in **red** throughout this form are areas that could contribute to a Major Accident.	
✓	**PRESSURE**	
	PRESSURISED SYSTEMS	Gas, Compressed Air, Fluid, Trapped Pressure, Bottled Gases, Projectiles, Hoses
	VACUUM	Pressure Difference
	HP/LP INTERFACES	Pressure Regulation
	RELEASE OF PRESSURE	**Over Pressurisation**, Pressure Line Release (Whip Checks)
	EQUIPMENT FAILURE	Hoses, Small Bore Tubing, Pipework, Air Tools, Valves, Wireline
	TRAPPED PRESSURE	Hydrates, Deflections
✓	**TEMPERATURE**	
	COLD SURFACE	Nitrogen Operations, Cold Liquid, Ice
	HOT SURFACE	Heat Transfer
	HOT LIQUID	Oil, Chemical, Flash Point, Flammable Atmosphere
	FIRE	Naked Flame, Heat Transfer
	EXPLOSION	Pyrotechnics, Non IS Equipment, Explosives, Pyrophoric Scale, Ignition Source
	SPONTANEOUS COMBUSTION	Pyrophoric Scale
✓	**MECHANICAL**	
	ROTATING EQUIPMENT	Serviceability/ Maintenance Level
	STORED MECHNICAL ENERGY	Compressed Springs
	EQUIPMENT FAILURE	Jacking Equipment, Hand Tools, Doors, Hatches, Gratings, Brackets
	MECHANICAL HANDLING EQUIPMENT	Trolleys, Stands, Surfaces, Weight of Load, Load Route
✓	**ELECTRICAL**	
	EQUIPMENT	Cables, High/ Low Voltage, Non-IS Equipment, Non-standard Modifications
	PORTABLE TOOLS	Serviceability/ Maintenance Level
	STORED/ INDUCED ELECTRICAL CHARGE	Uninterrupted Power Supply
	ELECTRICAL SPARK	Equipment Condition, **EX Equipment**
	ELECTRICAL ARCHING	High Current
	STATIC	Equipment Condition
✓	**GRAVITY**	
	DROPPED OBJECT / POTENTIAL DROPPED OBJECT	Deflection, Sliding, Bouncing, Lift Equipment Failure, **Collapse**, Stored Energy, **Structural failure**
	FALLING PERSON	Suspension Trauma, Safety Equipment Failure, Collapse
	SNAGGING EQUIPMENT	Sharp Edges, Protection Failure
	OVERLOADING	Shearing, Load Bearing Equipment Failure
✓	**MOTION**	
	ROTATING EQUIPMENT	Projectiles, Snagging
	FRICTION	Lubricants
	VIBRATION	HAVS, **Erosion**
	COLLISION IMPACT	Sharp or Abrasive Object, Trapping, Stored Energy
	SLIPS, TRIPS & FALLS	Hoses, Pipes, Valves, Stairs, Steps, Excavations
	DISCHARGES	Exhausts, Pipes
	TRANSPORT	Aircraft, **Vessels**, Vehicles (Forklifts), ROVs
	ACCESS & EGRESS	Congestion, Confined Space, Restricted Movement, Entrapment
✓	**NOISE AND VIBRATION**	
	EXCESSIVE NOISE	Loss of/ Limited Communication, Long Term Health Effects, Noise Pollution, High or Low Frequency
	VIBRATION	Hand Arm Vibration (HAVS), Duration of Hand Tool Use
✓	**BIOLOGICAL**	
	DECOMPOSING WILDLIFE	Disease spread (fleas & ticks)
	BACTERIAL & VIRAL	Food (Gastro-Intestinal Infections), Air (Cold/ Flu) & Water Borne (Legionella), Human/Animal Waste - Gastro-Intestinal Infections (Guano)
	FUNGAL SPORES	Mouldy Building Materials, Decaying Vegetable Matter, Rotting Waste Material
	AGGRESSIVE ANIMALS	Allergies, Bites, Scratches, Kicks, Disease

✓	CHEMICAL	
	CARCINOGEN	Asbestos, Oil, Condensate Vapour, Benzene
	HAZARDOUS SUBSTANCES	Benzene, Nitrogen
	TOXIC	Mercury, Chlorine, Hydrogen Sulphide (H2S),
	IRRITANT	Mineral Fibre (Rockwool), Acid, Caustic
	AIRBORNE PARTICLES	Dust, Fumes, Vapour, Inhalation of fibres (asbestos), Hydrogen Sulphide
	ASPHYXIATION	Nitrogen, Benzene, Halon, Argon, Oxygen Deficiency (Confined Space Work)
	DISCHARGE FROM VESSELS	Land, Sea, Air
	FLAMMABLE	Flashpoint
✓	**RADIATION**	
	IONISING RADIOACTIVE SOURCES	Nucleonics
	NORM	Pipes, Vessels, Valves - Inhalation, Ingestion
	ELECTRONIC MAGNETIC RADIATION	HV Cables, Switch Rooms
	MICROWAVE & RADIOWAVE	Line of Sight Dishes
	X-RAY	Positioning (Radiation Exposure)
	LASERS	Positioning (Eye Damage)
	UV & IR RADIATION	Arc welding, Sunlight/ Welding (Skin Burning), Heat Sources (Eye Damage)
✓	**ENVIRONMENT**	
	WASTE	NORM, General Waste, Contaminated Material, Segregation, Authorisation
	SPILLS	Oil and/or Chemical to Deck, Sea or Land, Slips
	EMISSIONS	Unauthorised Emissions
	LIGHT & NOISE POLLUTION	Local Community Impact, Light Positioning
✓	**SAFETY SYSTEMS**	
	SAFETY & ENVIRONMENTALLY CRITICAL ELEMENT (SECE) IMPAIRMENT	Communication Equipment, Escape Arrangements, Active Fire Protection, Hydrocarbon Containment, Blowdown or Relief Systems, Drains & Vents, Emergency Power & Lighting, Emergency Shutdown Systems, HVAC, Navigational Aids, PFP, Well Control Equipment, TR, Dynamic Positioning, F&G Detection Systems, Asset Integrity, Diving Systems, Critical Instrumentation
	AREA ZONE CLASSIFICATION BREACH	**Explosive Atmospheres** (ATEX) Zone (1, 2, 3 or 20, 21, 22)
✓	**HUMAN PERFORMANCE**	
	INDIVIDUAL CAPABILITY	Young Persons, Pregnant or Nursing Women, Physical and Mental Health
	COMPETENCE LEVELS	Knowledge, Aptitude, Training, Experience, New/ Unfamiliar Equipment
	TASK	Repetitive, Duration, Attention Required, **Safety Critical**
	WORKING HOURS	Long Hours, Routine/ Repetitive Work, Fatigue, Prolonged Concentration
	WORKING ENVIRONMENT	Temperature, Humidity, Ventilation, Light, Posture, Space, Weather
	LONE WORKING	Communication, Equipment Use, Manual Handling, Emergency Notification
	ROLES AND RESPONSIBITIES	Unclear Procedures, Lack of Information, Conflicting Roles
	HUMAN ERROR POTENTIAL	Time Pressure, Milestone Achievement, Job Security, Tiredness, Ill-Health
	ERGONOMICS	Body Positioning (Muscular Fatigue), Task Duration, Rests, Equipment
	DESIGN	Legibility, Confusing Signs/ Indications, Complexity
✓	**OTHER**	
	SECURITY & ARSON	Security Measures/ Personnel, Fire Prevention Measures (Storage of Material)
	UNDERGROUND HAZARDS	Electrical Cables, Ducts, Buried Pipes, Damaged Services, Water Ingress
	OVERGROUND HAZARDS	Powerlines, **Aviation**, Wildlife, Weather
	WEATHER	Wind, Visibility, Sea State, Current, Snow/ Ice, Wind Chill, Heat Index
	SIMULTANEOUS OPERATIONS (SIMOPS)	Communication, Decision Making, Awareness, Cumulative Risk
	MANAGEMENT OF CHANGE	Software Upgrades, People

Note - This is guidance only and not a definitive list, other hazards (both personal and Major Accident Hazards) may exist.

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Appendix 4;

Risk Assessment Form

STEP CHANGE IN SAFETY — **RISK ASSESSMENT**

Task Description:..... Company:..... Location/Department:.....

ASSESSED BY	REVIEWED BY	
Name/Position:.....	Name:.....	Date:..... Time:.....
Name/Position:.....	Position:.....	Procedure: .....
Name/Position:.....	Signature:.....	Risk Assessment No: .....
		Permit No: .....

PLAVE AN 'X' THE WORKPLACE HAZARD(S) INVOLVED

Major Accident ☐	Pressure ☐	Temperature ☐	Mechanical ☐	Electrical ☐	Gravity ☐	Motion ☐	Sound ☐	
Chemical ☐	Biological ☐	Radiation ☐	Environment ☐	Safety Systems ☐	Human Factors ☐	Other.....		

TASK CHUNKS	HAZARDS	RISK RANK BEFORE CONTROLS (See Note 1)	CONTROLS/ACTIONS REQUIRED	RESPONSIBLE PERSON	AFTER CONTROLS RISK RANK

Continue on page 2 if required

Note 1: Risk Rank criteria: Significant – potential to cause multiple fatalities/ serious injuries, High – potential to cause single fatality/ serious injury, Medium – potential to cause life changing injury, Low – potential to cause injury

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TASK CHUNKS	HAZARDS	RISK RANK BEFORE CONTROLS (See Note 1)	CONTROLS/ACTIONS REQUIRED	RESPONSIBLE PERSON	RISK RANK AFTER CONTROLS

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Appendix 5;

Task Instruction Form

STEP CHANGE IN SAFETY

TASK INSTRUCTION

Task Name: .....

Date of issue:..... Revision No:..... Next Revision Date: .....

Company:..... Location/Department: .....

WRITTEN BY

Name:.....

Position:..... Signature: .....

LIFESAVING RULES VERFIED

INDEX & ACTIVITY SHEETS

1 PURPOSE 2
2 TASK SCOPE 3
3 REFERENCES 3
4 MATERIALS 3
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6 SYSTEM STATUS 3
7 HAZARD SUMMARY 3
8 HANDOVER COMMENTS 3
ACTIVITY 1.0 – DESCRIPTION 4
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ACTIVITY 7.0 – DESCRIPTION 10
ACTIVITY 8.0 – DESCRIPTION 11
ACTIVITY 9.0 – DESCRIPTION 12
ACTIVITY 10.0 – DESCRIPTION 13
TASK INSTRUCTION – AFTER ACTION REVIEW 14

	Warning: Requires action by the user to prevent actual loss or where an action is irreversible, or when physical damage to the machine or person is possible.
	Caution: Advises of error that could occur should the user fail to take or avoid a specified action.
	Note: Information that is important to the actions, or to an important point.

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Appendix 6;

Toolbox Talk Form

STEP CHANGE IN SAFETY

TOOL BOX TALK FORM

TBT

Installation / Location:
Work Order / Permit Number:
Date:

PREPARATION LIST	✓
Necessary documentation ready	
TBT location selected	
Key TBT steps prepared	
Worksite visited	

WHY ☐	Reasons for task, any previous lessons learned?
WHAT ☐	Explain the task, hazards and review controls (Personal and Major Accident Hazards)
WHO ☐	Who else is giving support to the task? Any resource requirements?
WHERE ☐	Worksite overview, including SIMOPs and weather
HOW ☐	Break into steps, who is responsible for what? What to do in an emergency
WHEN ☐	Time of task, stop task triggers

Version – 4

TBT

PREPARATION TIPS:

Review the necessary documentation (permit, risk assessment, task instruction)

Select somewhere to deliver the TBT that assists with listening and understanding

Our brains typically remember a few things best so consider 'chunking' the job into activities such as: pre task checks, rig up scaffold, lift load, rig down.

DELIVERY OF TALK TIPS:

Be confident in your delivery

Keep it interactive and ensure you engage with the team – look them in the eye

Keep it relevant to the task and do not get distracted

Identify & clarify responsibilities

Use clear & concise language – avoid acronyms and technical language

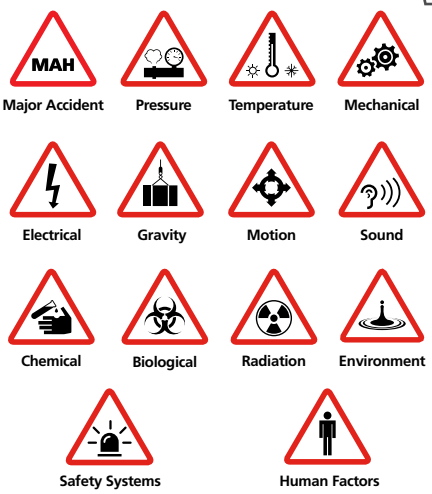
HAZARD IDENTIFICATION

DRA

LIFESAVING RULES

Other:

WORKPLACE HAZARDS



Other:

CHECK UNDERSTANDING

Opportunity given to ask questions ☐

Everyone is comfortable to proceed ☐

TIPS:

Ask relevant and open questions to confirm understanding with team. Is there anything you do not understand.

TOOL BOX TALK ATTENDEES

	Name		Name
TBT Lead		6	
1		7	
2		8	
3		9	
4		10	
5		11	

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Appendix 7;

Observation Card

OBSERVATION CARD

OBS

Name:

Location:

Date/Time:

Company:

Type of observation (please tick)

☐ Conversation ☐ Safe ☐ Act/Behaviour
☐ Observation ☐ Unsafe ☐ Condition/Consequence

WHAT DID YOU OBSERVE OR WHAT CHANGED?

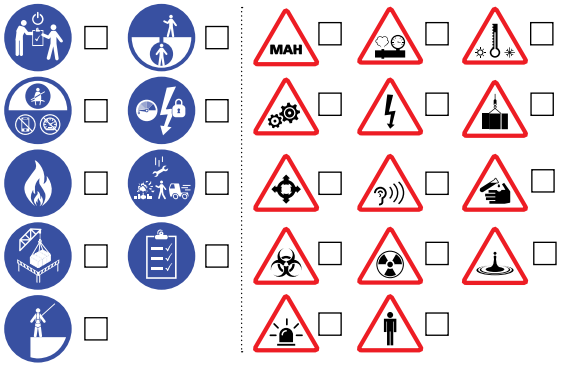
WHAT DID YOU DO ABOUT IT?

Did you stop the job? ☐ Yes ☐ No

WHAT COULD WE DO ABOUT IT?

INDIVIDUAL/TEAM/ORGANISATION FEEDBACK

HAZARD(S) IDENTIFIED (MARK AS IDENTIFIED)



Other:

Feedback given? ☐ Yes ☐ No

Reference:

Version 4

Appendix 8;

Task Assurance Form

STEP CHANGE IN SAFETY

TASK ASSURANCE

Task Description:.....

YOUR DETAILS

Name:..... Location:.....

Date:..... PTW No:..... Isolation Cert No:.....

Company:..... Signature:.....

LIFESAVING RULES VERIFIED

☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐

Other:

When completing a Task Assurance the following are areas to consider or discussion/confirmation at the worksite:

Major Accident Hazard/ Process Safety	Application & integrity of isolations, Communication Equipment, Escape Arrangements, Active Fire Protection, Hydrocarbon Containment, Blowdown or Relief Systems, Drains & Vents, Emergency Power & Lighting, Emergency Shutdown Systems, HVAC, Navigational Aids, PFP, Well Control Equipment, TR, Dynamic Positioning, F&G Detection Systems, Asset Integrity, Diving Systems, Critical Instrumentation
Control of Work	permit to work scope, contents & understanding, compliance with procedures, understanding of hazards & implementation of controls, quality of tool box talk
Human Factors	communication/ handover, training & competence, simultaneous operations (including helicopter & marine), management of change, correct use of serviceable equipment
Emergency Response	location of emergency equipment, actions to take in the event of an emergency, confirm stop the task authority, rescue plan in place as required

FINDING	FOLLOW ON ACTION

Continue on page 2

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Appendix 8;

Task Assurance Form

FINDING	FOLLOW ON ACTION

WORKPLACE HAZARDS DISCUSSED

Major Accident ☐	Pressure ☐	Temperature ☐	Mechanical ☐	Electrical ☐
Gravity ☐	Motion ☐	Sound ☐	Chemical ☐	Biological ☐
Radiation ☐	Environment ☐	Safety Systems ☐	Human Factors ☐	Other.....

SUPERVISOR REVIEW:

Name:..... Date: .....

Signature: .....

Comments:

Page 2 of 2

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Appendix 9;

After Action Review Form

STEP CHANGE IN SAFETY

AFTER ACTION REVIEW

AAR

Installation / Location:
Work Order / Permit Number:
Date:

PREPARATION LIST	✓
Permit to Work pack available	
Team present	
Task Instruction available	
Observation Cards available	

WHY ☐	Reasons for task, any lessons learned?
WHAT ☐	Description of task, hazards and review controls (Personal and Major Accident Hazard)
WHO ☐	Who else gave support to the task? Resources sufficient?
WHERE ☐	Worksite overview, including SIMOPs and weather
HOW ☐	How did the task steps work out?
WHEN ☐	Time of task, stop task triggers

Version 4

Appendix 9;

After Action Review Form

PREPARATION TIPS:

Review the necessary documentation (permit, risk assessment, task instruction)

Ensure the team are available and have had time to review their role in the task

Our brains typically remember a few things best so consider 'chunking' the job as you complete the AAR

DELIVERY OF AAR:

Be confident in your control of AAR

Keep it interactive and ensure you engage with the team – look them in the eye and get their input

Keep it relevant to the task and do not get distracted

Clarify the responsibilities that the team had and identify learnings

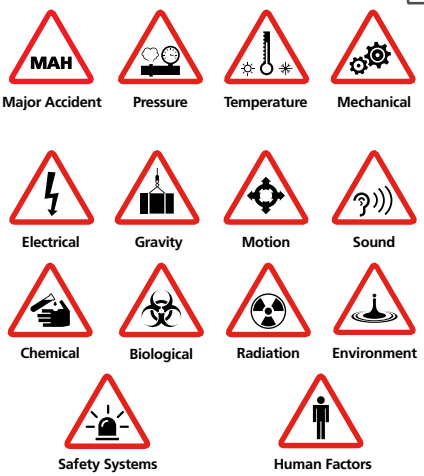
Use clear & concise language – avoid acronyms and technical language

HAZARD IDENTIFICATION

LIFESAVING RULES

Other:

WORKPLACE HAZARDS



Other:

CHECK UNDERSTANDING

Opportunity given to ask questions ☐

Lessons identified ☐

TIPS:

Ask relevant and open questions to gain input from the team.
Clarify if there is anything the team did not understand.
Identify good practices as well as opportunities to learn.

AAR ATTENDEES

	Name		Name
Team Lead		6	
1		7	
2		8	
3		9	
4		10	
5		11	

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Notes

Notes

STEP CHANGE IN SAFETY

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Version 4

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