



# High Quality Pre-Job Safety Meetings Guide



# Importance of High Quality Pre-Job Safety Meetings

High-quality pre-job safety meetings are a cornerstone of most successful safety programs. When executed masterfully, these brief conversations can enable the team to anticipate and mitigate most, if not all, dangerous conditions. These meetings must take place immediately before work and should be facilitated by a member of the field leadership or crew (e.g., foreman, supervisor).

*At a minimum, the team should assemble at the worksite to discuss:*

**1.** What are the key work steps?

**2.** What hazards are present for each work step?

**3.** What hazards are present around us today?

**6.** What changes might occur today and how will they be managed?

**5.** How will we control each hazard, especially life-threatening hazards?

**4.** What hazards are potentially life-threatening?

**7.** When and how will we stop work?

**8.** What will we do in the event of an emergency?

**9.** Have all the required documentation completed?

# Terminology



## Hazards:

An energy source that when released has the potential to result in injury, illness, or damage.



## Life-Threatening Hazard:

A life-threatening hazard is one that is so dangerous that the most likely outcome from contact is a serious injury or fatality. These are also referred to as high-energy hazards. Examples include pressurized vessels, moving parts of energized equipment, and suspended loads.



## Direct Control

A targeted intervention that provides a sufficient safeguard against a life-threatening hazard like fall protection, lock-out tag-out, and machine guarding.

**This guide assumes that the pre-job safety meeting is attended by all workers who will perform the job and is facilitated by an individual who is very knowledgeable about both safety and the specific task at hand. This document guides this facilitator on what to do before, during, and after a pre-job safety meeting. The section that covers best practices during a pre-job safety meeting corresponds to the Pre-Job Safety Meeting Scorecard.**

# Before The Meeting

A pre-job safety meeting must be set up for success. These meetings are best executed when the facilitator has a clear understanding of the work tasks, the associated hazards, and the necessary controls. A well-prepared facilitator enables an effective and efficient meeting and demonstrates to the team that safety is a top priority.

## Before starting the meeting, the facilitator must:

### ***Know the Task***

including the sequence, configuration, materials, tools, equipment, and other attributes of the work.

### ***Know the Environment***

like the different crews that may be sharing the workspace, weather, or terrain.

### ***Know the Dangers***

by identifying the common hazards associated with the work and the environment.

### ***Know the Schedule***

of activities that may be performed at or near the workspace.

### ***Know the Situation***

by identifying anything out of the ordinary or any changes or disruptions that may occur.

### ***Know the History***

of the crew including levels of experience, any recent safety-related challenges, successes, or failures.

# During The Meeting

Once the pre-job safety meeting is set up for success, the facilitator should ensure that all workers actively participate and start the day with a clear understanding of the work steps, hazards, controls, roles, and responsibilities.

An excellent facilitator brings out the best in the team, recognizes important contributions, and encourages even shy workers to speak up. The facilitator should prompt the workers to provide as much content as possible. For example, instead of attempting to identify the hazards themselves, the facilitator should encourage the workers to identify hazards and provide suggestions only if one is missed. To make the best use of the team's valuable time, the facilitator should make sure the meeting is efficient.



## Setting up the Meeting:

The first step is to ensure that the meeting is held as close to the work as reasonably possible. The meeting should also be held in a location that is safe, reasonably quiet, and comfortable to avoid distractions.

### 1. Ensure all crew members are present



To ensure engagement and active participation, all crew members working on the job must be physically and mentally present at the meeting.

### 2. Hold the meeting where the work will be performed



The meeting should be held as close to the workspace as reasonably possible. This allows the crew to point out specific hazards and avoid assumptions or misunderstanding. When the meeting cannot be held at the workspace, a re-huddle should take place before work begins to discuss any hazards and controls that may have been missed.



## Describing the Work:

A pre-job meeting should focus on a specific job that is broken down into well-defined work steps. This is important because it creates an awareness of how the work will be performed and clarifies roles and responsibilities.

### 1. Identify and discuss the major work steps to complete planned tasks



The facilitator should ensure that all workers have appropriate training and competence for their assigned tasks. The facilitator should encourage the workers to break down their planned tasks into major steps and confirm if those steps are appropriate and accurate. For each step, the team should establish clearly defined roles and responsibilities. The team should acknowledge any situations where someone may be working alone and create a communication plan.

### 2. Identify necessary materials, tools, and equipment



The team should identify and discuss the materials, tools, and equipment needed to complete the job. The facilitator must confirm that the team has access to the necessary tools and that they are in good condition.



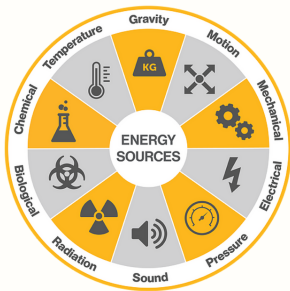
## Hazard Identification and Control

Perhaps the most important activity in a high-quality pre-job safety meeting is the identification, prioritization, and control of hazards, especially those that are potentially life threatening.

### 1. Identify hazards associated with the task



Although it can be tempting for a knowledgeable facilitator to identify hazards for the workers, the hazards associated with the job should be identified and discussed by the workers. When identifying hazards, generic hazards like 'pinch points' and 'slips and trips' should be further clarified. For example, workers may clarify that a trip hazard exists because a cable tray is across a walkway or a pinch point exists because of two sections of pipe. To ensure that the hazard scan is broad and complete, the facilitator may use the energy wheel as a tool to remind workers of hazard types that are commonly overlooked. The facilitator should encourage workers to identify all hazards that come to mind first. Then, the energy wheel can be used to prompt the workers to consider hazard categories that they may have overlooked. After the workers have exhausted the hazards that they can identify using their experience and the energy wheel, the facilitator should review and explain the hazards that were missed so the workers can identify them in future.





## 2. Identify hazards in the environment

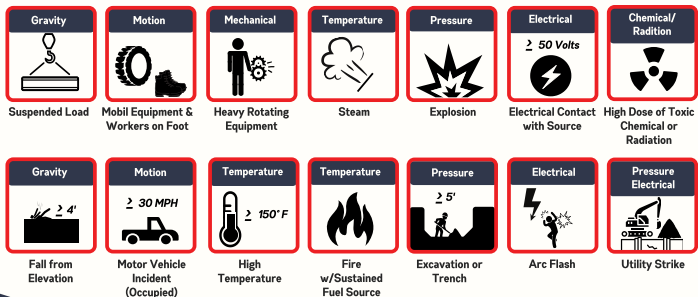


Often, workers become focused on the hazards associated with just their tasks. However, the team should also identify and discuss hazards in the work environment or those posed by adjacent crews. This may include hazards that are introduced by weather, nearby crews, the public, or environment.

## 3. Specifically call-out and discuss all life-threatening hazards



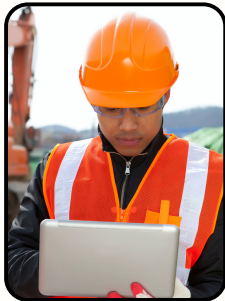
All life-threatening hazards must be specifically highlighted and discussed in detail. These hazards are also referred to as high-energy because they have a high amount of physical energy like significant height, heavy objects, high pressure, high voltage, or high speeds. These hazards deserve the greatest attention and engagement from the team because of the extreme consequences. Below are some examples of life-threatening or high-energy hazards.



## 4. Identify and implement controls for each hazard



For all hazards identified, the facilitator should ensure that adequate mitigations and controls are available and properly implemented. Special attention should be paid to ensuring direct controls for all life-threatening hazards. These may include de-energization, lock-out/tag-out, machine guarding, fall protection, and others. Like the other discussions, the facilitator should encourage the workers to identify controls and step in when one is missed or needs further clarification. Furthermore, the facilitator should ensure the controls in-place are adequate in mitigating danger.



## Complete Required Documents and Permits

Typically, the business requires the work team to document the pre-job safety meeting and obtain all required permits. Although the quality of the discussion is the most important part of the pre-job meeting, documentation is important for verification.

### 1. Document the meeting



At a minimum, documentation should include the specific job tasks, hazards, and safe work practices that were identified and discussed in the meeting. The final document should be acknowledged and signed by the entire team, indicating that the team members understand, approve, and will follow the plan. This seemingly minor action can generate a sense of ownership of the plan.

### 2. Obtain all permits



The team must confirm that all required permits (e.g., confined space permit, hot work, excavation, lifting, etc.) have been obtained prior to beginning work. The facilitator should discuss when and how to access the permits during the job and confirm that special precautions noted in the permits are discussed.



## Planning for Change

Work rarely goes exactly as planned. Conditions change and unexpected hazards may be encountered. Changes should be discussed to ensure that the team is equipped to respond appropriately. When planning for change, stop work authority and emergency response plans are especially important for preventing serious injuries and fatalities.

## 1. Discuss potential changes



Change is a common root cause of serious injuries. About a third of all hazards on a jobsite are related to changing conditions. Therefore, to effectively address change, crews should iteratively ask themselves:

- **What could change?**
- **How does the potential change impact our safety?**
- **What will we do if the change is encountered?**
- **What will we do if an unexpected change occurs?**

## 2. Discuss stop-work authority



When life-threatening hazards are found to be uncontrolled during the work period, stop work authority should be exercised immediately. During the meeting, the facilitator should remind the team that they have the authority and the duty to stop work if a serious hazard is encountered. To avoid confusion and increase worker confidence, the team should discuss the types of conditions when work should be stopped and how stop work should be officially communicated.

## 3. Create emergency response plans



Emergencies may happen at any time. The facilitator must ensure that everyone knows their roles and responsibilities in the event of an emergency (e.g., who will administer CPR, who will call emergency services), the location of emergency tools (e.g., defibrillator), safe paths of egress, muster points, and expected behavior. It is also important that everyone understands the roles and responsibilities of others. Finally, the facilitator must resolve any potential confusions and conflicts in the response plan (e.g., who should workers report to, prioritizing different response plans) before work begins.

## Encourage Participation and Engagement

A high-quality discussion ensures that workers fully understand the content of the meeting and increases the likelihood that the safe work plan will be followed. The facilitator's primary role is to ask questions, seek clarifications, recognize the value of the workers' ideas, and balance the discussion so that everyone participates.

### 1. Ensure workers acknowledge the work steps, hazards, and controls



The facilitator should also seek verbal assurance that everyone understands the work steps, hazards, controls. This helps the facilitator to confirm that the everyone on the team truly understands the safe work plan. To gather this information, the facilitator may ask the workers to repeat back key work steps, hazards, and controls in their own words.

### 2. Encourage active participation



Active participation involves workers providing input and asking questions of others. To encourage active participation, the facilitator should ask open-ended questions during the meeting, involve workers who are shy or less experienced, and recognize the valuable contributions that each worker makes. Completing a checklist

or passively reading completed paperwork should be avoided. Instead, the facilitator should encourage a vibrant discussion where all workers provide input and ask questions. This will make the plan more complete, instill a sense of ownership among the team, and make each individual workers feel valued.



# After The Meeting

At the end of the meeting, the facilitator should publicly recognize key contributions made by specific workers. As the work progresses, the team should remain vigilant by scanning for hazards that were not anticipated, identify any significant changes in the work, and stop work to re-plan when necessary. The facilitator should check in with the team periodically to assess whether the original plan remains effective or if the plan should be revisited.

# Final Thoughts

Pre-job safety meetings are one of the most important safety activities that take place on site. When performed well, these brief meetings help the team to mitigate life-threatening hazards that lead to serious injuries and fatalities. Taking the time to ensure active participation and meaningful discussions provides an opportunity to build safety culture and demonstrate that safety is the top priority.



# Acknowledgement

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\*Denotes team leaders

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