# Assess and Improve Pre-Task Planning (PTP) Using CPWR's Checklist

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**CPWR – The Center for Construction Research and Training** 

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## **CPWR's Project Team**

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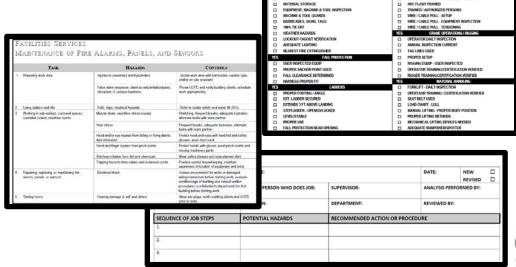


## **Project & AIMS**

Project: CPWR's "Prevention through Augmented Pre-Task Planning" funded by NIOSH.

**AIMS:** Enhance the quality of Pre-Task Planning (PTP) in construction.

- Identify gaps and shortcomings in current PTP practices
- Explore effective strategies to fill the gaps
- Develop an applied tool to help practitioners assess and improve their PTP process



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## Why Pre-Task Planning?

- Research findings suggest that most work-related injuries could be prevented by:
  - Proactively identifying hazards and unsafe conditions associated with each task, tools/equipment, materials, work methods, and jobsite
  - Properly addressing hazards using effective controls before work begins
- When and how to recognize and address hazards?
- Pre-Task Planning (PTP) is a process performed before each task starts to discuss the steps of work, the hazards, and available controls. This process may also be known as JHA, JSA, morning huddle, etc.



"... when we've done something a thousand times before, we begin to overlook things. We assume that the next time will be just like the last.

We are so used to doing what we've always done that we don't stop to question whether it's the right thing to do at all."

James Clear – Atomic Habits: An easy & proven way to build good habits & break bad ones



#### **Methods**

#### **Are current PTP practices functional? What's missing?**

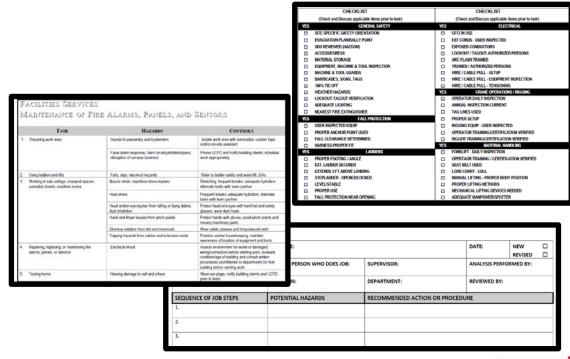
- Interviewed 28 construction managers and safety & health professionals
- Interviewed 93 construction workers
- Observed onsite Pre-Task Planning and morning huddles
- Reviewed sample Pre-Task Planning forms and documents
- Reviewed findings with our Industry Advisory Group



### **Pre-task Planning; Challenges and Gaps**

#### The gap in the process:

- Lack of comprehensive guidelines
- Inconsistent style
- Inconsistent terminology (JHA, JSA, PTP, AHA ...)
- Confusion and conflicts on jobsites
- Mainly from a compliance perspective
- Minimal opportunity for workers' input
- Lack of workers' engagement in site safety planning
- Lack of task-specific content
- Inconsistency between content and task requirements





## **Preliminary Findings**

#### **Optimizing content**

Challenges	Recommendations & Strategies	
<ul> <li>Long and wordy documents</li> </ul>	<ul> <li>Provide task-specific information</li> </ul>	
<ul> <li>Inconsistency between content and task requirements</li> </ul>	<ul> <li>Use one-page summaries</li> </ul>	
<ul> <li>Lack of management presence on jobsites</li> </ul>	<ul> <li>Replace text with visual aids when possible (photos, videos)</li> <li>Frequent site visits by management</li> </ul>	
<ul> <li>Minimal opportunity for workers' input</li> </ul>		
<ul> <li>Lack of supplemental information on topics besides S&amp;H</li> </ul>	<ul> <li>Provide additional information – tools, materials, schedule, other crews, etc.</li> </ul>	
	<ul> <li>Recognize hazards from adjacent crews</li> </ul>	



## **Preliminary Findings**

#### **Lack of Buy-in**

Challenges	Recommendations & Strategies	
<ul><li>Pencil-whipping</li></ul>	<ul><li>Personalize the process</li></ul>	
<ul> <li>Resistance to change</li> </ul>	<ul> <li>Make it more interactive</li> </ul>	
<ul><li>Repetitive/Redundant</li></ul>	<ul> <li>Incorporate real-life incidents and near-misses</li> </ul>	
	<ul> <li>Get workers directly involved</li> </ul>	
	<ul> <li>Designate workers to serve as liaisons with management</li> </ul>	
	<ul> <li>Actively solicit and incorporate workers' feedback</li> </ul>	

Stop mindlessly slipping into an ineffective routine.

Today's task **IS NOT** the same as yesterday!



## **Preliminary Findings**

#### **Communication & Coordination**

Challenges	Recommendations & Strategies	
<ul> <li>Lack of consistency in communicating jobsite changes</li> </ul>	Perform site audits regularly	
<ul><li>Poor presentation skills</li></ul>	<ul> <li>Engage all stakeholders equally in site safety planning</li> </ul>	
<ul><li>Lack of mentorship</li></ul>	<ul> <li>Train workers and crew leaders on how to conduct PTP meetings</li> </ul>	
<ul><li>Language barrier</li></ul>	<ul> <li>Pair non-English speaking workers with bilingual coworkers</li> </ul>	
<ul><li>Absenteeism</li></ul>	<ul> <li>Brief workers who were absent on current site condition</li> </ul>	
	<ul> <li>Perform post-job review/debrief</li> </ul>	



## From Research to Practice: An Applied Tool

- Translated research findings into an easy-to-use, one-page assessment checklist
- Helps field supervisors assess their PTP process and identify areas for improvement
- Each "No" answer indicates an area for improvement
- Reviewed and tested by 25 construction safety and health professionals in an iterative process
- The checklist is currently available in a <u>fillable PDF format</u>
- Let's have a walkthrough to see how to use it ...

**NOTE:** This checklist <u>IS NOT</u> an exhaustive list of best practices. These are some good practices to help change old, ineffective routines in conducting PTP.

## PRE-TASK PLANNING (PTP) ASSESSMENT CHECKLIST



Pre-Task Planning (PTP) is a process performed before each task starts to discuss the steps of work, the hazards, and available controls. This process may also be known as JHA\_JSA morning huddle, etc.

This checklist has been developed based on research findings and input from industry experts to help construction practitioners evaluate and improve their PTP process. Each "No" answer indicates an area for improvement. Please note that this checklist is not a real accement for your PTP.



Please use the QR code above or go to http://bit.ly/3Fh4ehN if you have any feedback or questions

		have any feedback or questions.
1.	Do you conduct PTP before each task starts?	Yes No 🗆
2.	Do you conduct daily walkthroughs to get a better understanding of the current site conditions • If you answered NO, please skip to question 3	? Yes ☐ No ☐
	a. Are workers involved in daily walkthroughs?	Yes 🔲 No 🖂
3.	Do you update PTP content when conditions change?  → If you answered NO, please skip to question 4	Yes No No
	a. Do you communicate these changes with workers immediately?	Yes 🔲 No 🖂
4.	Does your PTP break the task up into manageable steps or sub-tasks?	Yes No 🗆
5.	Does your PTP specify hazards associated with each step of the task?	Yes 🔲 No 🗀
6.	Does your PTP discuss ways to control each hazard?  → N you answered NO, please skip to question 7	Yes No No
	a. Does your PTP identify who is responsible for implementing the controls?	Yes No 🗆
7.	Does your PTP discuss hazards posed by other crews working close by?	Yes No 🗆
8.	Do you provide any formal training to conduct or lead the PTP meeting?	Yes No
9.	In addition to the crew supervisor, do workers have the opportunity to lead the PTP meeting?	Yes 🔲 No 🗀
10.	Do you gather workers' feedback on PTP content and delivery?  → If you answered NO, please skip to question 11	Yes No No
	a. Do you incorporate their feedback?	Yes 🔲 No 🖂
11.	Does your PTP use photos or other visual aids instead of text where possible?	Yes No 🗆
12.	Do you use educational aids like a whiteboard or live demonstration in your PTP process?	Yes 🔲 No 🗀
13.	Does your PTP include supplemental information such as:	
	a. Site layout?	Yes No 🗆
	b. Medical facility location and contact information?	Yes No No
	c. Evacuation plan and muster point for emergencies?	Yes No No
	d. Work schedule?	Yes No No
	e. Tools?	Yes 🔲 No 🔲
	f. Equipment?	Yes 🔲 No 🗆
	g. Materials?	Yes No 🗆
	h. Specific types of PPE?	Yes 🔲 No 🔲
14.	Do you conduct end-of-shift review with your crew to discuss what went well and what didn't?	Yes No 🗆
15.	Is PTP information easily accessible to workers after the meeting is completed?	Yes No

#### **Testimonials**

"It is clear and simple. Straight to the point."

-Corporate Safety Director

"Good checklist with good questions."

-Operations Manager

"It only took me a minute to fill out, but it made me think for hours about why we aren't doing some of these things."

-Senior Vice President

"I like the way this was put together and I feel this will help us with the way we use our PTP."

-Anonymous

"The checklist is thorough and asks the 'right' PTP assessment questions."

-Anonymous



## **Contributing Companies and Organizations**





































## Thanks!

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