**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 replacement for your PTP.

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? Yes □ No □
   ➔ If you answered NO, please skip to question 3
   a. Are workers involved in daily walkthroughs? Yes □ No □
3. Do you update PTP content when conditions change? Yes □ No □
   ➔ If you answered NO, please skip to question 4
   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? Yes □ No □
   ➔ If you answered NO, please skip to question 7
   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? Yes □ No □
    ➔ If you answered NO, please skip to question 11
    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 □
   c. Evacuation plan and muster point for emergencies? Yes □ No □
   d. Work schedule? Yes □ 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 □